

**Open Textbook Summit 2015 Conference Report**  
**Prepared by Brady Yano, SFSS VP University Relations**

Introduction

The Open Textbook Summit took place on May 28-29, 2015 at SFU's Harbour Centre campus in downtown Vancouver. The Summit brought together over 140 leaders in the open textbook field including, faculty who are reviewing, adopting and developing open textbooks, librarians, institutional administrators, government officials and student advocates. Comprising of a series of keynote speeches and workshops, the conference served as an invaluable experience to network with potential allies of the SFSS Open Textbook Campaign and learn new, innovative approaches to making our campaign more successful.

This document will not serve as an exhaustive report detailing each session. In the spirit of open however, BC Campus has made available the keynote speeches and the slide decks used in the various sessions which can be accessed at <http://otsummit.bccampus.ca/>. Further, thanks to Shirin Escarcha, highly detailed notes of the conference can be found at the end of this report.

A special thank you goes out to BC Campus for organizing a fantastic event and providing the SFSS with a discounted registration fee, as well as the SFSS Advocacy Committee for funding Pierre Cassidy, Campaigns Research and Policy Coordinator, Deepak Sharma, VP Student Life, Shirin Escarcha, member and myself to attend.

Overview of Day 1

The highlight of day one was an inspirational keynote speech by Dr. Rajiv Jhangiani, a current BC Campus faculty fellow and professor of psychology at Kwantlen Polytechnic University. Rajiv's talk touched on the very essence of why open textbooks are so important:

1. They are good pedagogy
2. There is a strong social justice argument supporting their usage

In terms of good pedagogy, open textbooks exist as the most viable means to reduce the cost of post-secondary education. In today's political climate, the likeliness of tuition being reduced is highly unlikely. Today, roughly half of all undergraduate students are completing their degrees with the assistance of student loans. With the average student in 2011 graduating with over \$29 000 in debt, studies have shown that three years post-graduation, only 34% of students are debt free. With textbook costs having rose 812% since the year 1975 and dropout rates increasing as

student debt increases, there is a clear need for change. Regarding traditional textbooks, their lack of flexible content is one of their greatest drawbacks. Often when trying to select a textbook, professors look at the numerous books available in the discipline and choose the one best suited for the class. However, these books still contain ample content which is irrelevant to the professors' specific course and the professor must sacrifice leaving out key content which is available in other materials. As such, students are left paying for content which will not increase their success and professors must assign an additional text or two to address the appropriate content. Open textbooks on the other hand provide the necessary flexibility as professors are able to pick and choose what content to include. Thus, there is zero trade off regarding included content.

For students, open textbooks exist as a more accessible, low cost alternative to the traditional textbook. For professors, open textbooks provide greater academic freedom as they have the capacity to update, adapt and remix materials as they see fit. Within the open textbook model, the textbook serves the course and not the other way around. And finally from an institutional perspective, increased use of open textbooks can lead to higher enrolment numbers, greater student retention and program completion. As such, open textbooks are a win-win-win situation!

On the other hand, the social justice argument is highly intertwined with the pedagogical argument. *If we aren't thinking about accessibility, who are we thinking about when we recall higher education - Rajiv Jhangiani.* Post-secondary education today is sought by individuals from all socioeconomic backgrounds. As such, it is time to break down the 19th century concept of the ivory tower by making education more accessible. Again it is clear that costs associated with higher education pose as a large barrier. But another is the lack of access to those within and beyond the inner circle of higher education. Having open access to high-quality information encourages the community at-large to continue learning beyond the walls of an institution. The average citizen has a case equivalent to that of a student when protesting the paywalls and roadblocks to accessing information. In order for our society as a whole to progress, we should be encouraging a more open environment of lifelong learning.

## Overview of Day 2

The highlight of the second day was a fantastic student keynote from former SFSS President, Chardaye Bueckert and Erik Queenan the current President of the Students' Association of Mount Royal University. Each spoke of their experience with open education to date and provided the student perspective of why OER's are valuable. Chardaye's talk introduced some of the most unorthodox things colleagues of hers have done to avoid purchasing textbooks. These included torrenting textbooks, placing a 'USED' sticker on a new textbook, photocopying, purchasing texts internationally and of course trying to get by without having access to the material at all. Chardaye also touched on open textbooks existing as one of the few non-partisan issues that all large political parties are able to support. Erik's speech on the other hand touched on the importance of working with whoever is willing to listen, whether that be students or faculty. At Mount Royal University, Erik found success in developing an OER with a

Business Statistics professor. Due to the static content of the course, the two found it relatively easy to develop a suitable text under a relatively short timeline.

The opening address of Day 2 was also notable as we received a speech from the Hon. Andrew Wilkinson, Minister of Advanced Education. Minister Wilkinson's speech touched on the expansion of the BC Campus collection, announcing the addition of 50 more OER's expected for September 2015. He also touched on the need for greater OER creation as BC's rising population is expected to lead to a 33% increase in enrolment at post-secondary institutions across the province; as such, he recognized the need for these individuals to being able to afford their education.

One last piece of advice was regarding how to measure success. Nicole Finkbeier argued that the correct way to do so is to *measure outcomes, not actions*. Regarding OER's, measurable successes include the number of faculty using OER's, number of students impacted, cost savings for students and increased academic performance by those using OER's. As such, organizing meetings and well attended workshops contribute to, but do not measure success. I think this was an extremely important takeaway which applies to the ongoing Open Textbook Campaign and all advocacy initiatives taken on by the student society.

### Conclusion

Overall this conference served as a valuable experience to connect with an array of individuals involved with the promotion, creation and adoption of open textbooks. The Summit also served as a positive reminder of why this campaign is so relevant to the SFSS mandate. One last thing I would like to touch on regarding open textbooks is the notion that 'because they are free, they must be of lesser quality.' Rajiv Jhangiani posed a fantastic question to challenge this notion, that being "*why isn't the bar set higher for traditional textbooks?*" The traditional textbook is dead, the traditional textbook is expensive and the traditional textbook model hinders rather than assists a progressive educational system; it is for these reasons that the shift towards open textbooks is inevitable and will benefit post-secondary students, staff and administration.

If you have any questions or concerns regarding the content of this report, or are interested in attending an Open Textbook working group meeting in the future, please contact me at [vpuniversity@sfss.ca](mailto:vpuniversity@sfss.ca).

# BC CAMPUS OPEN TEXTBOOK SUMMIT

CONFERENCE NOTES - Prepared by Shirin Escarcha

Thursday and Friday, May 28 & 29, 2015 | Harbour Centre

Twitter: @BCOpenText | Hashtag: #OTSummit

Schedule Link: <http://bccampusopentextbooksummit2015.sched.org/>

## DAY 1

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# DAY 1

## Welcome and Introduction

(9:00 AM - 9:15 AM)

*Mary Burgess, Executive Director*

Twitter: @BCOpenText | Hashtag: #OTSummit

## An openness to openness: The terrifying and liberating process of disrupting higher education

(9:15 AM - 10:15 AM)

*Dr. Rajiv Jhangiani*

### Overview of work with OER

- Started as a review (of 2 textbooks) - adapted by him 2 months later (outside of the program)
- Worked with Capilano University professor to revise Psychology textbook
- Extensive work with BC OER
- Latest work: collaboration with colleague from Quest University

### Open Textbooks are good pedagogy and represent social justice!

Statistics re: affordability of post-sec ed and text:

- Half of Bachelor's degree graduates rely on student loans
- In Sept 2010, federal student loan surpassed \$15 billion
- Average student debt in 2011 was \$29,947
- 3 years after grad, only 34% of students are debt free
- BC students now work 180% more hours than in 1975
- When debt reaches \$10k, program completion drops from 59% to 8%
- Costs of text has increased by 812% over 30 yrs

### How do faculty members choose textbooks?

Steps

- STEP 1: Not "Do I need a text" but "Which textbook do I assign?"
- STEP 2: Textbook publishers come and provide different version of books
  - Options provided include paper format and E-textbook
    - Some faculty members confuse open text with E-textbook but this isn't the case - license expires after 6 months → what about students who need to retake?
- Textbook publishers might provide sponsorship incentives

- Framed in the following way: “for x textbooks provided, \$x will be provided - this funding can be used for conferences, scholarships”
- Choosing books: They receive 20 textbooks, shortlist to 6, narrowed to 2-3 that the faculty can holistically agree to - not necessarily the best books

Study: Direct relationship between textbook costs and student success

- 60%+ do not purchase textbooks at some point due to cost
- 35% take fewer courses due to textbook cost
- 31% choose not to register for a course due to textbook cost
- 14% have dropped a course due to textbook cost
- 10% have withdrawn from a course due to a textbook cost

eg) Picture: Torrent note for Penn State University

## 5 R's of Open Educational Resource - Reuse, Retain, Redistribute, Revise, Remix

In surveys conducted:

Survey A

- Quality of Traditional Publishing: 50% roughly favorable rating
- Quality of OER: 30% rate OER as good or excellent, 60% don't know about it

Survey B

- Students were surveyed by Jhangiani and highly enjoyed the open text, convenience of access, and costs-savings - most within this survey saved \$101-150 - more than 50% of students did not prefer a traditional textbook for this course
  - Student comments: “I would not have bought the textbook for this course because it's an elective. I would have possibly walked away with a C, now I might actually get an A-”
- **If we aren't thinking about accessibility, who are we thinking about when we recall higher education?**

Results from studies re: OER

- Study: Hilton and Laman (2012) - Houston Community College
  - 23 sections (690) students)
  - Increase in GPA, decrease in withdrawal rate, avg in final exam marks
- Robinson et. al (2014)
  - Quasi-experimental design
  - Propensity-score matched groups
  - OT students scored slightly higher on end-of-year standardized science tests
  - Significant gains in chemistry
- Jhangiani et al (in progress)
- 8 sections of introductory psychology
  - Traditional vs. open textbook
  - Digital open textbook vs. print open text

- Measure of course performance, study habits, personality factors, demographic factors, etc.

**Open textbook is win-win-win situation!**

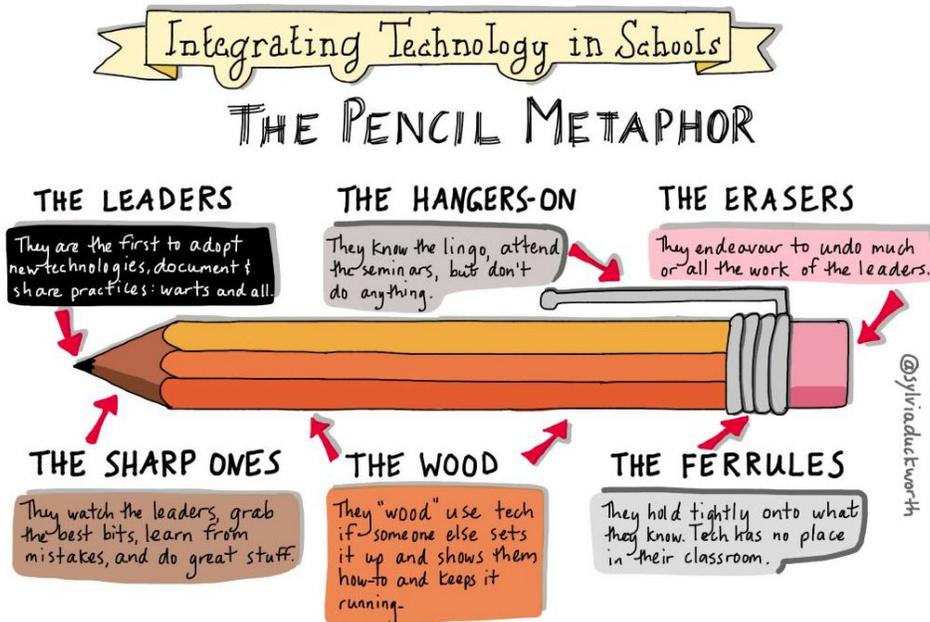
Students	Faculty	Institution
Access, cost savings, portability, course performance	ACADEMIC FREEDOM - ability to adapt, update, remix  Usually the course serves the textbook when it should be THE OTHER WAY AROUND!	Enrolment, student retention, program completion  Might lose money at the bookstore but there will be an increase in recruitment, retention, better grades

McGraw-Hill President stated at education conference : “Traditional Textbook is dead”

How can we move openness to the mainstream?

- Survey: “A Survey of Movers: Students Who Move Between BC Public Post-Secondary Institutions: A Summary of Findings”
  - Students are clearly demanding more flexibility which is provided by OER
- Students: KPU and TRU have been leaders in open TEXT in British Columbia
- Librarians: BCOER Librarians
  - Natural allies to cause
  - Working collaboratively to create resources, better the culture

The Pencil Metaphor - perfect analogy for how OER can succeed



Example of Culture of OER leader

- The Great Psychology Test-bank Sprint
  - 2 days of question writing: almost 2000 questions
    - Exciting, engaging for all involved

Building a culture for OER

- Get people involved, incentivize the creation of OER.
  - 280 students collectively saved \$46, 000 (2 textbooks to 3 open texts)
- How can we make these resources sustainable?
  - **Faculty should not only adopt a text but FOSTER a textbook - take ownership and nourishment**

The process of disrupting higher education - access, transparency, collaboration

## **OPEN PRACTICES**

### **1. Open Scholarship**

- Open Materials
- Open Data - analyze using statistical software
- Send data to open software like JASP
- Peer Review - Nature Communications; quality does not change but it's harder to find a peer reviewer
- Open Publishing - PLOS One

Great collaborators include Centre for Open Science engaging at every stage of open scholarship (providing supporters, etc.)

### **2. Open Pedagogy**

- Open textbooks
- Open assignments - production of resources for the public (instead of just tradition research papers)
  - eg) APS Wikipedia initiative - online resource portfolio for students
- Open and flexible learning pathways
  - eg) OERu
- Open course development
  - eg) WikiEducator

eg) NOBA - key scholars asked to create module for sub-topics in Psychology

**Open scholarship and pedagogy = better scholarship & pedagogy**

**We set the bar high for open, free resources - why isn't the bar higher for textbook publishers?**

## Disruption in the Library: How OERs are Changing and Challenging the Role of Librarians

(10:30 AM - 11:00 AM)

*Caroline Daniels, Erin Fields, Leva Lee*

### First Speaker - Caroline Daniels

#### **Do anything to make it easier for faculty to use OER**

Integration ideas:

#1 Catalogue OER Collections

#2 Integrate open resources into discovery layer

#3 Gather OER resources in your ERM

#### **Leverage traditional services for non-traditional purposes**

#### **Ask for Help: BCcampus**

#### **Ebooks vs. Open textbooks**

- Faculty don't understand the difference
- Less control with e-books

#### **Start a Small Team**

- Faculty feel better when they have a point of contact

#### **Open Education: Corraling a Collection - Erin Fields**

- More about the wrangling process
- Problem with OER - very large topic, hard to describe to librarians - how can you make sense of it?
- Developing strategy on teaching people how to curate content  
eg) Walk the Walk! - BCCampus Media Wiki - one shared core resource - putting all content and guide on this link so it can easily be embedded in other sites
- Emphasis on creation of GUIDES instead of TUTORIAL

**“It's just change”**

## Open Textbook Campus Action Plan Workshop

(11:15 AM - 11:45 AM)

*Nicole Allen*

Digital copy of action plan: <http://bit.ly/open-education-action-plan>

## What can you do on your campuses to move things forward?

### STEP # 1 - Think about who it affects

**Stakeholders** - people affected by policy work

Examples on campus:

- Faculty - department chairs, faculty senate
- Students - student government, clubs, leaders
- Librarians
- Admin
- Bookstore
- IT

Who are the right people to contact? Who do you want to work with?

### STEP # 2 - What's wrong on campus?

**Status quo and mission** - Challenges and scope of the project

Ask yourself:

- What are the issues?
- Are there already efforts around this issue?
- What is your missions statement?
- What do you want to accomplish to make the status quo better?

### STEP # 3 - What do you want to accomplish?

#### Goals and Activities

Example:

Goal: Engaging with library, adopting a policy on campus around open licensing to resources

Activities: adopt, vet policy

Practices of other universities:

#### UBC AMS

- Emphasis on flexible learning in general
- Senate created 2 ad-hoc committees and determined that they relate
  - 1) flex learning wellness and mental health - relates to affordability (relation between wellness and mental health + flex learning)
    - Exam prep database - launching in September
    - Mid-course feedback - creating dialogue with students to ensure they're happy with students
- Deans are in support of OER but department heads have the power due to autonomy

#### University of Calgary

- Sells access to database - really good uptake with larger classes
- Clubs are highly involved in awareness/promotion

### Mount Royal University

- Blended courses use online text (but is this open?) therefore looking more at physical class buy-in

### Oregon State University

- Relationship with university librarian who is also head of university press
- Proposal for faculty to send in work that can be provided to students for free - picked 5/14

\*tied in with signature area of university - making part of university culture

Sample goal: (from Tacoma CC)

Outcome: Engage students and faculty in a collaborative effort to create OER standards and policies for curriculum development

In order to reach this outcome, TCC will:

- Draft a college-wide OER policy in which all works for hire at TCC are released with Creative Commons Licensing
  - Activity: Tim seems comfortable with this concept already
  - Activity: Write the policy and present it institution wide (Fall 2012)
  - Find a way (repository?) to share our efforts
- Commit to consider OER for all new courses and as a part of any textbook evaluation process
  - Activity: This can be part of the OER policy
  - Activity: Build support through advocacy
  - Activity: Examine a process to make this easier for faculty

### **STEP # 4 - How can you make the initiative last?**

#### **Administrative and institutional support**

Staffings

Partnerships

Sustainability and Reporting

### **STEP # 5 - What will get in the way?**

#### **Barriers**

## **ADVOCACY PLANNING**

### **STEP # 6 - Advocacy Planning Worksheet**

Proposal → process → decision maker → influencers → strategy → tactics

Remember:

Strategy = Theory - Create tactics that align to the strategy

Tactics = Actions - Does the tactic achieve the strategy? Ensure they align!

eg) Strategy - Convince the chancellor that it is in the interest to adopt a policy to support OER

Tactic: Have the chair in state legislature to call the chancellor and mention their support for OER

## **STEP # 7 - How do you raise awareness?**

### **Communications -**

Audience: Keep them in mind

Frame: What do they think and care about?

Message: How will you say what you want to say?

3 rules: Have a message, repeat it, repeat it

Therefore, CONSISTENT MESSAGING is important.

### Elements of a message

1. Hook - how to introduce people to idea
  - a. Every student knows what it's like to walk into the bookstore and pay ~\$200 for one textbook
2. Problem
  - a. Prices have skyrocketed 4x
3. Solution
  - a. We have tech to solve these problems. We need more profs to adopt the program
4. Call to Action
  - a. Where students come in to build pressure and raise awareness of the problem and solutions like open textbooks

## **Open Pedagogy**

(1:00 PM - 1:30 PM)

*Mary Burgess*

Assessment is the most powerful learning tool that faculty engage in.

- Audience Q: Doesn't forced assessment (rubric) provide artificial responses from students?
  - eg) when students are forced to comment on blogs for marks?
    - A: Overall, students and community are able to engage in conversation about topics both parties may be interested in
    - Students can also be asked to co-create a rubric
- Audience comments:
  - Assessment **for** learning instead of assessment **of** learning

**What is the best way to engage students in deeper learning? - This is a conversation that needs to be built upon. There is no concrete answer.**

Sheet: BCcampus Open Pedagogy Effective Learning Design Matrix

- Innovative (effective - learning centred) vs. uninspiring (ineffective)
- Column 1, Row 1: Open (Resources and Approaches), Effective Learning Design
  - Wikiproject: Murder, Madness, and Mayhem
    - SPANISH 312 (UBC) - asked to contribute to Wikipedia and incorporate information about Latin history
      - Goal was to receive “Featured Article” status
        - 3 were featured
      - Content went extremely viral
  - PM4ID
    - Created by students as an open textbook
  - Wikimapia
    - Help build open source mapping community (done as an authentic learning exercise and learning example)

AUDIENCE IDEAS/SUGGESTIONS FOR Open, Effective Learning Design:

- Videos
  - Place on specific course website (wikis) that can be reused overtime

General Audience Questions/Comments

- Q: What about students who are uncomfortable with their blog posts being publicly available? What about opting in/opting out method
  - A: Conversation has taken place about this.
    - Part of conversation about universal design and student input in their learning.

Link for further examples Open Pedagogy exercises: [link will be tweeted]

## Are We There Yet? Measuring Adoption of Open Textbooks

(1:30 PM - 2:00 PM)

*Ross McKerlich*

Objectives:

- Understand the importance of measuring adoption of open text
- Evaluate a possible metric for measuring adoption of open textbooks

Your Story (Large Group Discussion)

- Creators of Open Textbooks
  - Comment from a creator: Usage is there, but people don't think about the concept of openness

- Users of Open Textbooks
  - Comment from user: Tested and liked it.
- Evangelists

#### A Research Story

- McKerlich was asked to find legislative funding for Open Textbooks
- “Open Access Textbook Task Force” was original name → focus changed to encompass broader idea of OPEN: Open Education Resource
- 154 responses of 10 days
- Areas covered in research:
  - Familiarity
  - Use of OER (includes re-use)
  - Creation of OER (adaptation)
  - Attitudes towards OER
  - Types of OER
  - Factors that would increase use

#### Why focus on use and creation?

- Creating OER leads to higher emotional engagement than simply using OER (Pawlowski, 2012)
- Emotional ownership could reduce one of the main barriers - a higher education culture that is the antithesis of open- by increasing stakeholder engagement
- In the OER community model, the activity of creating, using, redesigning to making it your own fills that stakeholder void

#### Emotional Ownership and the OER Development Process (Clements and Pawlowski, 2012) (cycle)

- Re-design (collab dev't)
- Re-use (collab teaching)
- Re-publish (improvement reputation mgmt)
- Design and development (imperfect design idea sharing)

#### A Letter Story

(story of how McKerlich created wooden letters - LOVE, for his wife - which was more interesting experience than buying something already made from Michaels)

- Create LOVE
- Use LETTERS

Example of innovation appreciation: Moodle Awards at Okanagan College on academic innovation

#### **Live Research - live survey**

Tool - Microsurvey link: [b.scorative.com](https://b.scorative.com) (room code: 375402)

- Is a measurement of Use: Creation Useful?
  - Idea is to determine where institution is at
- What makes a good ratio?
  - should it be creation: use instead?
  - should it be %:% or count: count?

**It is emotionally satisfying to improve on OER!**

Final quote: Sir John Daniel - Commonwealth of Learning

**“Until the focus of OER is on production instead of reuse it could not be considered a mainstream adoption”** (Daniel, 2011)

## Faculty Attitudes Towards and Experiences with OER Open Textbooks

(2:30 PM - 3:00 PM)

*Christina Hendricks, Jessie Key, Rajiv Jhangiani, Beck Pitt - OER research hub*

### Background

- The timeline
  - Launched early 2015 - 5 months
- 78 participants representing 17 institutions
- Detailed report to be released later this summer

### Emphasis of presentation

- Faculty use
- Adaptation - most significant challenges

### Sample characteristics

- Degree: Over half have doctoral
- Type of institution : over half from special purpose teaching uni (places like Kwantlen, TRU), 14% from research intensive institutions
- Primary mode of teaching: 54% face 2 face ft, 17% f2f pt
- Primary role: 55% classrooms instructors

### Use, creation and sharing of OER

Use of OER - Overview (they an answer more than one)

- 60% used OER
- Under 40% - adapted
- Sample are people interested in OER

## Use, Adaptation, Creation

Those who have been teaching for 1-3 years have the highest number of people who have created

- By type of institution
  - Highest use at cc, most created at research inst
- Purpose of using OER
  - Ideas and inspiration is most 60+%
  - supplement coursework
  - reprepare for teaching
  - learning resources
- By years of teaching experience
  - With more teaching experience, they use OER more
- Sharing of materials publicly
  - highest is 40% - not publicly but w/ colleagues
- Sharing of materials publicly by years of teaching experience
  - more teaching experience = not publicly but w/ colleague
- Sharing by type of inst
  - SPTU - not publicly but w/ colleagues - just over 50%

## **Challenges and Enabling Factors**

Time, intellectual property, institutional support, challenges faced - overview

### Challenges faced overview

- finding relevant OER - almost 60%
- finding oer
- low quality
- no time to look
- no time to try

### Difficulty finding suitable oer

- 73% comm. coll.
- 33% RI
- 61% SPTU

### Perceived quality of OER

- Comparable 30%, Almost 20% felt that it was significantly better, 15-20% felt it was significantly worse
- Correlation between adoption and perception quality

### Enabling factors

- Relevant to needs - over 60%
- Reputable producer

- Easy to download - approx 50%
- CC license
- Adaptation permitted
- Successful experience

An openness to openness?

- Openness (from Big 5 factors of personality)
  - Curious, reflective, creative, deep, open-minded & unconventional
  - Those who are more open to experience (a major factor of personality) are more likely to have adapted OER

^note: openness to experience was also measured in the survey

Questions from the Audience

- Is data set going to be publicly available?
  - There's a post of preliminary research on website
- Survey is self selected which is interesting
  - Might be interesting to do ft vs pt instructors, tenure vs. non-tenure
- Is there on data on how it has affected student success?
  - No, because study focused on faculty

## Exploring the impact of open textbooks around the world

(3:15 PM - 3:45 PM)

*Beck Pitt*

Links: [oerresearchhub.org](http://oerresearchhub.org) | [oermap.org](http://oermap.org) |

Twitter: [@OER\\_Hub](https://twitter.com/OER_Hub) [@BeckPitt](https://twitter.com/BeckPitt)

Background

- Open research project funded by William and Flora Hewlett Foundation
- Aiming to build the most comprehensive picture of oer impact
- Open collaboration model across different educational sectors
- Global reach by with a US focus
- Fellowship scheme
- Researching openness in the open

Structure of research

- Structured by 11 hypothesis (divided by 11 keywords)

OER Impact Map Link: <http://oermap.org>

Evidence Report: <http://oerresearchhub.org>

## Collaborators

- eg) open ed consortium, flipped learning, roer4d, project co-pilot, vital signs

## Educator Sample: OpenStax College (2014/2015)

- Released 12 textbooks to date
- 50 respondents - ½ male, ½ female
- Nearly 80% of respondents in USA
- Half work in university context
- Nearly 70% have been teaching for more than 10 yrs
- 85.7% of respondents told us they have adapted open educational resources to fit their needs

## What motivates people to adopt/use Open Stax textbooks?

- To design curriculum and cost savings
- “Textbooks we have been using had gone into a new edition and the new edition was too expensive. Downloadable pdf... was attractive to students”

## **Do students save money using OER?**

-Educators and students both save money

## **The challenge of finding OER**

- Over ¾ of educators surveyed told us that finding suitable resources in their subject area and/or finding resources of sufficiently high quality were most faced challenge for OER
- 36.7% became aware of OER via internet
- 18.4% became aware of OER via openstax textbooks and or via colleagues or personal connections

## **Educators Perception of the Quality of OER**

### Impact on educators

- I use a broader range of teaching and learning methods - 64%
- I reflect more on the way that I teach - 59%
- I have broadened my coverage of curriculum - 59%
- I frequently compare my teaching with other - 44.5%
- OER having arrange of impact on content and teaching

## In what ways have Open Stax impacted on your own teaching practice?

- Led me to explore other open source material
- Use the tb more during class time for small group work
- Gave me impetus to flip my classrooms
- I've got more time to find supplements, labs, to do activities, and to have discussions with my students
- Book no longer drives the course

In what ways has OpenStax impacted your students

- Convenience and cost
- Overall savings of 100k
- Becoming independent learners
- All of my students to have a textbook
- Feel ownership of the resource
- Breathing room
- They love to read the book on their phones - they love reading their books on their phones in the hall

Evidence or experiences to support perceived impact of OpenStax college textbooks

- Get the same knowledge
- Possible to separate out its effects on students learning
- No more waiting
- Portability of information
- Avg class grade increase considerably
- Students are much more likely to take an inquiry or question and seek their own answers

Evidence or experiences to support perceived impact of OpenStax college textbooks

- 69.8 - increases learners satisfaction with the learning experience
- 34.1% - increase learners enthusiasm for future study

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## DAY 2

### Welcoming Remarks by Hon. Andrew Wilkinson, Minister of Advanced Education

(9:00 AM - 9:15 AM)

*Hon. Andrew Wilkinson*

- Currently 70 textbooks in the system
  - 50 additional open text coming September 2015
- BC received award for innovative education (open texts)
  - eg) post Capilano University, TRU
  - \$700k saved to date due to open text
- Courses with static content will remain the same for years
- 1/3 of growing population will enter post-secondary

- We need to ensure they can afford their education

## Student Keynote Panel - Why Openness Matters: Access, Advocacy, and the Future

(9:30 AM - 10:15 AM)

Chardaye Bueckert, Erik Queenan

### Chardaye Bueckert

- 3 main reasons why OER matters
  - **Costs**
    - Avg book & material cost per student per term - \$300 - \$1k
    - Books and materials as 38% of total educational cost per term for domestic students
    - Ever changing editions render expensive books
    - What have students done to avoid paying for a textbook?
      - Torrenting
      - “Used” sticker on a new textbook
      - Buying, photocopying, returning
      - International travel - buying textbook in another country
      - Going without the book - 38% of students will avoid buying course materials - USPIRG says it can go up to  $\frac{2}{3}$
    - Textbooks are big business
      - ~1.5 million full time students in Canada x \$600 yr on books - ~\$893,721,600 annual textbook sales in Canada
        - This doesn't even mention part time students
      - Bright side: Saving from BC Open Textbook program - \$700k to date
  - OERs matter **academically**
    - Time
  - OERs as a political valence issue
    - Cost-effective
    - Nonpartisan
    - Mutually beneficial
    - Case Study: Tidewater Z-Degree - free education
      - Public saved ~\$6 million dollars in loans
- SFSS Work (2013-ongoing)
  - Student outreach
  - Faculty and admin engagement
  - Discussion with gov't
  - Library consultation
    - Ally - Dean of Libraries

- Liaising with other student unions
- Challenges
  - Lack of uptake at SFU and other research based institutions
  - Publisher pressure
  - Lack of awareness amongst students and faculty
  - Academic freedom
- Lessons Learned
  - Allies abound
  - There is always more to learn
  - There is always room for one more
  - Open as the future
- Opportunities
  - Student union collaboration
    - Particularly research based institutions
  - Canadian open network
  - Cross border collaboration
  - Canadian institutional champions
    - We need research institutions to take the lead
  - Celebrating success/milestones

## Erik Queenan

- Background
  - Wanted to get involved - seemed like a natural place to start, an initiative with great potential, saving students money
  - “Grassroots” approach -
  - Providing students resources
- Work
  - Hit traction - many were for the idea but “not in their community”
  - OER Alberta Initiative
  - “Business Statistics” - attempted to get open text for this class due to static nature of material
    - Timeline: Heard about OER on October, deadline for Jan 16, meeting with faculty on Jan 10 but eventually received funding
- Advice
  - Hold hands in solidarity with FACULTY or STUDENTS
  - Know your resources
  - Think big, act small - baby steps
- Road to Awareness
  - Traditional textbooks and OT are of the same quality

## Question and Answer Portion

- Q: Think big and act big - what does this look like
  - A: Bueckert says having a major research institution champion it
- Queenan says that faculty members who review OER are most like to adopt it
- Q: Insights re: research-intensive university
  - A: Bueckert says skepticism about quality (inferior because open) and opportunity cost for faculty members
  - A: Queenan says university needs to review and not assume
- Q: Connection with library and librarians
  - A: Queenan says he met with librarian re: OER - believes it is totally valuable
  - A: Bueckert says Dean of Libraries has been an ally - spoke to librarian after Open Con. Librarian made presentation by
- Comment: Faculty are already burnt out and exhausted
  - A: Queenan says it would be good to include open text in tenure promotion
  - A: Bueckert says the more prestige there is for open text, more faculty members are likely to adapt.
- Comment: Teaching and learning centres are also good natural allies because in many universities, they work closely with faculty.

## Institutional Initiatives to Promote the Use of Open Textbooks

(10:45 AM - 11:15 AM)

*Nicole Finkbeiner*

Objectives:

- How do you measure success?
- Successful initiatives take several approaches simultaneously

How do you measure success?

- Lots of efforts fail because they measure the wrong thing
- Right way: **Measure outcomes, not actions**
  - # of faculty using OER
  - # of students impacted
  - \$\$\$ savings for students
  - Student success
- Actions that contribute to but **DON'T** equal to success
  - Meeting
  - Workshop
  - # of people who attended meeting
  - Having a display

Institutional Initiative Puzzle

- Of the following approaches, complete 8:
  1. Expressed support from administration

- a. When trying to promote OER, faculty will question the importance of OER. Therefore, important to get admin involved
  - b. Ask admin to send out internal email in support of OER
  - c. Other ways: convocation speech, faculty newsletter, OER policy
2. Presentations during department meetings
  - a. Ask someone to email department chairs and let you come in during a regular department meeting - when attendance will be high
3. Ask faculty to directly pilot the books
  - a. Search for innovative faculty members and approach them one on one
    - i. Important to do one one one in being mindful of stigma re: innovative teaching techniques, etc.
4. Promote "Textbook Heroes" and ask them to promote OER
  - a. Find faculty who use OER and approach their administration about it
    - i. The more faculty involvement the better
    - ii. eg) Faculty Fellowship in New Mexico - promote innovative techniques and open educational resource use
    - iii. Faculty is used in ads - "My students shouldn't have to choose between buying textbooks and buying groceries" Faculty quote
5. Hold faculty workshops offer a stipend for publicly reviewing OER
  - a. eg) Uni of Minnesota does this
    - i. Most likely that those faculty will adopt those books at a decent rate
6. OER grants programs
 

Model:

  - a. Orientation Day - hands on to write syllabus language, creative commons laws, how to access faculty resources
  - b. Measurable outcomes - track how much students save, etc.
  - c. Efficacy studies - some study to see impact of grant
  - d. Adoption at scale
7. Incorporate into evaluations/tenure
8. Involve the students!
  - a. Student Government Associations
  - b. Student PIRG
  - c. Student Newspapers
9. Utilize visuals, create displays
  - a. eg) bring textbooks to conferences, meetings, randomly display in high traffic areas of faculty offices, etc.
    - i. Faculty want to see the realness of material
  - b. Display - How much many did you spend on textbooks? (Interactive Tally)
10. Involve your faculty senate/union
11. Hire an OER implementation group
  - a. Lumin (sp.?)
12. Recruit faculty to author/review OER for groups such as OpenStax College
13. Incorporate OER into your class search function

- a. eg) Ohio State Medical School - req't for students to carry iPad. Students found out that med reference book was \$5 and started using OER.
  - b. eg) Maricopa Community College - class function - Students actually have an option to look for low-cost/no cost textbooks
14. Highlight what other institutions are doing
- a. Look into Harvard, Stanford, and other big name universities

Eg) of report template

Academic Year	Annual number of students using Open Stax College	Annual Savings
[Data]	[Data]	[Data]
<b>TOTAL</b>		

Key institutional partner schools (in one year)

- 37% more adoptions
- 43% more students
- 1.4 million in additional saving

**Multi-faced and long term approach is necessary.**  
**Let's work together.**

Question and Answer

- Q: (?)
  - A: Open Stax - Mission: lowest cost studies for students
    - Continue to receive grant funding
    - Recruits authors to write and review text
      - Put on extensive editorial process
        - Placed on the web for free
    - Beyond general connections, faculty were looking for something high quality and complete that would be simple to transition to

## Adapting and Editing Open Texts - A Tiered Model

(11:30 AM - 12:00 PM)

*Claude Laflamme and Nathan Friess*

Content: Where and how to get the right one

Course syllabus → Student profile = Content

- Traditional Landscape
  - “Canned model” - courses to match textbook, when it should be the other way around

- **OER's answer:**

- **“ADAPTATION!” - but who will do this?**

Example of challenges of adapting OER:

- “While I know that the text could be improved and modified to suit our purposes better, the fact is that all of us here are busy with teaching and research and don’t have time to invest in improving text. when it comes to teaching first year cal people want the text all done for them so that they can concentrate on dealing with students, marking, etc.” - TRU, Bruce Crofoot
- eg) Intro to Financial Accounting book
  - Questions asked by staff re: OER book: “We need to teach payroll” and didn’t see it in your book, can it be added?
- IFRS/GAAP
- eg) Micro/Macro Econ
  - “Tone down the (math) level”
    - This is tricky for OER venture - it will take ~6 months to do this
- Just about every course syllabus is different - this is a concern for faculty
- Very little open content still available

Content: A tiered model

eg) Accounting: Introduction to Financial Accounting

- Lyryx Learning
  - Found older textbook and convinced author to make it open
  - Content was modernized - adapted for Athabasca University

but who’s going to make the edits? The team at Lyryx Learning

Background of Lyryx Learning - spin off of university. Students are hired to help. However, editing was done by highly skilled editors.

In summary: Material redone and adapted for a certain courses

And all other things to adapt:

- Online assessment
- Test bank
- Lecture notes/slides
- Solution manuals

Questions and Answers

- Q: Who funds?
  - Funded by university.
- Speaker thought about a book: Original copyright was from England and McGraw-Hill gave back the copyright. Originally

- Q: Assessment of Lyryx?
  - A: Appoint someone who has been teaching content for a long time and ask what has been taught.
- Q: Contract with user to guarantee registration?
  - A: Depends - so far no one has been rejected

**PROVIDE:**

- +Perfect open text!
- +Supplementary material
- +Support to users - eg) faculty will be given help
- +Fair cost - eg) \$40

(all of the aforementioned have to be adapted to reflect course/syllabus)

85% of students pay for optional fee in University of Calgary to pay for open text  
 -Experiment was a measure of the fairness of the price

Right model?

- Enabling factors: finding oer, quality, adaptation
- Respective expertise (content, editorial, technical)
- Overall cost benefits

Starting summer 2016, McRoyal will not be attached to Lyryx

## From Grassroots to Grasstops: Winning Institutional Support for open Textbook Adoption

(1:00 PM - 1:30 PM)

*Ethan Senack, USPIRG*

[studentpirgs.org/textbooks](http://studentpirgs.org/textbooks)

Objectives:

- What do I want to accomplish on my campus?
- How do I go about it?
  - What are the questions to ask?
  - Who are the people to talk to?

Goal: What do you want to accomplish on your campus?

(Audience response: cost savings for student, faculty involvement, awareness - interest on campus, baseline of "open", innovating teaching and learning)

- 3 general goals
  - Increase adoption of Open Textbooks on my campus

- Increase Awareness
- Increase Creation

Goal, strategy, tactic

- Goal
- Strategy - you can never see strategy in the dark?
- Tactic

Coming back from this conference, who is the first person you'd talk to about what you learned?  
 (Audience response: provost - from student leader, touchbase with the library - student leader, teaching and learning centre - suggestion from staff, colleagues)

- Engage your own constituency first
  - Start here because you have the first access - this is also where you have the most familiarity

<p>What do I say to them?</p> <ul style="list-style-type: none"> <li>● Are you familiar with open textbooks?</li> <li>● What do you know about them?</li> <li>● How do you feel about them?</li> </ul>	<p>Tell</p> <ul style="list-style-type: none"> <li>● Here's what I know about open textbooks</li> </ul>	<p>Ask</p> <ul style="list-style-type: none"> <li>● Are you interested in doing something about it?</li> <li>● What do you think we can do about it?</li> </ul>
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- Engage leaders of other constituencies
  - What are the problems your they face?
  - How does this impact them or help solve them?

Case: University of Washington - Approach: Student Technology Fee Committee - had surplus in their budget and were accepting proposals - submitted proposal, unfortunately it was out of committee's purview. However, committee recommended more appropriate avenues

- After those conversations. you should
  - Have a general sense of who is on board
  - Know what general concerns you'll face
  - Understand who has the power and resources to make those changes which leads to STRATEGY.

Strategy

- Choose a person, choose a thing to do
  - Who has the resources and ability to make change?
    - Student governance
      - Student Society
      - Senate - academic affairs
    - People who work with online learning and technology
    - Vice Provost

- What can they do?
  - Create a pilot program
  - Hire someone
  - Hold a training
  - Send an email to all faculty

eg) We want the Vice Provost of Academic Affairs to sponsor a workshop for faculty on OT.

#### Tactics

- How can you convince X person to do Y?

Grasstops Strategy - people above the line. Distinguished leaders, decision makers,

- Demonstrate that thought-leaders and key people on campus are behind the idea
- Could be as simple as getting you head librarian to on board

#### Grassroots Strategy

- Means that the decision-maker was not inspired to act by your grasstops champions
- Means that you need to demonstrate broader support from the community at large

eg) "#textbookbroke" campaign, press releases - external media and campus newspaper, create faculty statement of support

eg) University of Maryland -  
 student govt → state legislature and they said no → went back to talk to school admin  
 → admin went to library →

eg) Tacoma Comm Coll  
 student govt to state legislature → learning director → librarian → provost → provost  
 actually went back to student gov't

#### Questions and Answers

- Q: Is PIRG compiling stats?
  - A: Report released in Spring - analyzed data from 5 pilot program (what was spent, what was saved)
    - On website:
- Q: Example of institution and bookstore behind it?
  - A: University of Minnesota - bookstore champions.
- Comment: Pres of Uni of Regina trying to promote sustainability around transporting textbooks.
- Q: Is strategic plan valuable?
  - A: Great idea - PIRG has not looked at it specifically/or done that.

## Eight Steps to Successful Change: Applying to John Kotter's work to Open Initiatives

(1:45 PM - 2:15 PM)

Anita Walz

### Background

- Virginia Tech
  - ~3700+ faculty - research, teaching, service
  - ~32000 students on campus + off campus
  - New President (2014) New Provost (2015)
- Librarian Realities in VT
  - Many areas of responsibilities:
    - Library support for online learning
    - Copyright training
    - Build good relationship with ED-Tech
      - Various needs and opportunities
      - Many, many changes
- Her work: explore and disseminate info regarding OER
  - Released a survey
    - 1)what are librarians doing
    - 2)what instructors are doing
    - 3)who are the advocates
    - Progress so far
      - Building my knowledge
      - -Clear messaging
      - -Finding and supporting interested faculty
    - ^ realized that she needed a better plan
- My Challenge: What can I do to ensure long-term successful initiatives at my institution?

We ask others to change. Is it too much to ask that we change?

### **8 STEPS ADAPTED BY JOHN KOTTER**

#### **Step # 1: Make it URGENT!**

#### **Step # 2: Powerful guiding team**

- Long term leadership
- Very, visible, powerful, highly regarded

#### **Step # 3: Craft CLEAR vision and strategy**

- Something that can be said in 5 minutes: state problem, solution, action required

**Step # 4: Communicate and get BUY-IN for Vision**

- Same message many time and many ways
- Address powerful dissenters early

**Step #5: Support people and remove barriers to change**

**Step # 6: Facilitate early wins**

- Visible, related, unambiguous

**Step # 7: Keep the momentum**

**Step # 8: Update culture, policy, and values**

- Produce more change
- “Individual-proof” the initiative

**Closing Remarks**

(2:15 PM - 2:30 PM)

*Mary Burgess*

- Acknowledgement and Gratitude
- Video: Textbook Inertia (Youtube)

## **Notes by Deepak (June**

### **Introductions:**

@thatpsychprof

KPU Prof

Its hammer on the nail. Must present o SFU staff, faculty, and students

[Lets put an small info session together at SFU for the fall](#)

### **Session #1:**

*Open Text meets TalkingHeads*

[https://docs.google.com/document/d/1hY\\_KMxxuRkSVKc0RJcP0r1JLY1-fG-ntfdz145Epvzc/edit](https://docs.google.com/document/d/1hY_KMxxuRkSVKc0RJcP0r1JLY1-fG-ntfdz145Epvzc/edit)

John Belsaw- Prof TRU

Context for online Distance/Independent Study

- Some sort of active learning, not just video
- How do you make an interactive video?
- You run video through; “Grockit.com” It generates questions, you already have feedback, nugget points that people wrestle
- History students should get more use to go through Archives
- Publish student work with peer reviews, as students do have good work
- Interviews “Is like researching another human being”
- Google: Phet simulation videos,
- Course developed alongside opentext book with video and stand al process

### **Session #2:**

*Open textbook campus action plan workshop*

Director of Open Education SPARC- Nicole Allen

- [bit/ly/open-education-action-plan](https://bit.ly/open-education-action-plan)
- Who do you want to engage with for particular stakeholders
- Whats your status qou, or mission statement
- What are the goals, and policy that you want to be creating for your campus
- Engagement piece: i) getting stakeholders involved  
ii) next step is getting policy changed
- Difference between bookstore and spirit stores
- Localize it so all profs have somewhat of an experience working with these
- Other Elements to consider when you get institutional support is to build it into the institution; community is important.

[We need to update FARM on how to work further with this; get brady to do a quick update meeting?](#)

- Proposal-Process-Decision Maker

- What are you advocating to do?-What is the process getting the proposal accepted-Who decides yes or no at the key step in the process
- Strategy vs Tactic; Identify the difference, while keeping the goal in mind
- “comms”
- Audience-Fram-Message
- Catered messages; speak about problem vs solution
- Continuity
- CRAM
- University Affairs magazine

## Lunch

### Session #3:

*Book Sprints for ICT learning materials*

Adam Hyde

- Essentially just went over five books that are similar to Book Sprint d
- Relationship with facilitator important to create good book sprint.
- The importance of experienced facilitator
- does not manage post production
- Can't be a therapist
- Role of editor was mentioned to be there
- Recommended that this is nothing in our interest for the time being

### Session #4:

*Are we there yet? Measuring the adoption of Open textbooks*

Ross McKerlich- Okanagan

- Reuse of OER
- Factors that would increase use
- Creating higher emotional engagement
- *Use and Creation*