























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

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

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

### Purchased, Subscription, or Both?

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

Table 4

*Licensed Library Material Content Types*

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

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

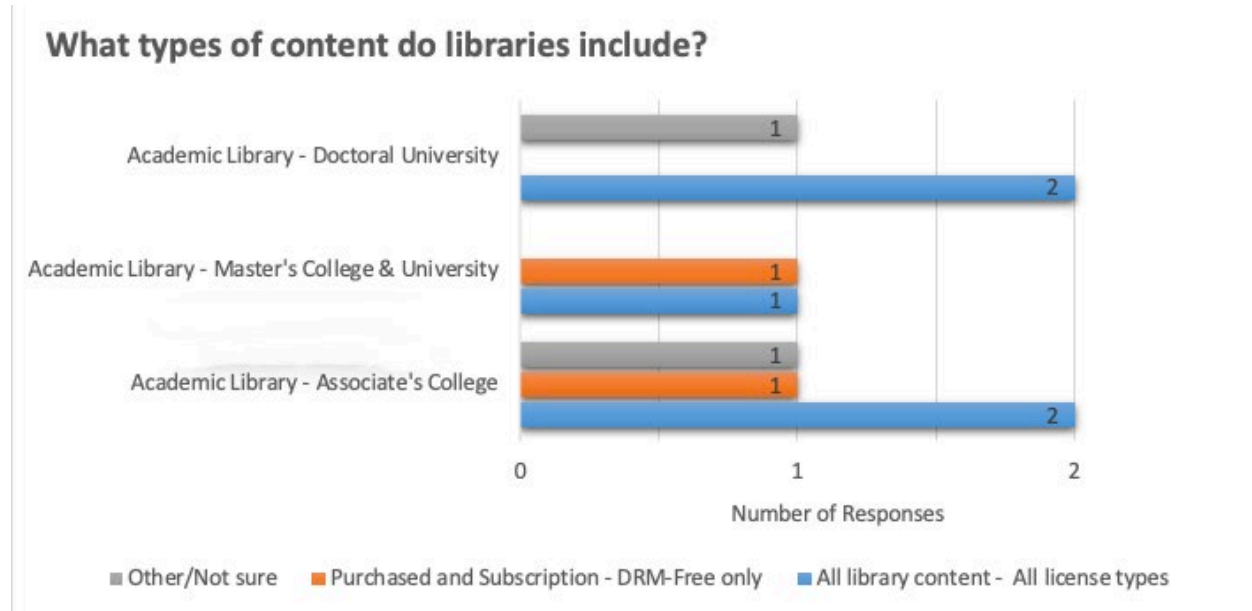


Figure 3  
*Responses Identifying What Types of Content Libraries Include in Their OER Initiatives*

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

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

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

### Barriers to OER Initiatives

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

Table 5  
*Responses Regarding Barriers to Starting OER Initiatives*

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

One respondent wrote:

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

Another noted:

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

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

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

## Discussion

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

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

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

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

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

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

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

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

## Limitations

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

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

## Conclusion and Future Directions for the WML Initiative

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

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

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

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

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

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

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

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

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## Appendix A

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

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

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

## Appendix B

### Open Educational Resources Survey

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

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

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

The deadline for the responses is July 10th.

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

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

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

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

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

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

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

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

If answer “Yes” to Question 6, proceed to Question 7

7. What types of content do you include?
- All library content - All license types
  - Purchased - All license types
  - Subscription - All license types
  - Purchased and Subscription - DRM-free only
  - Purchased - DRM-free only
  - Subscription - DRM-free only
  - Other/Not sure

If answer not “Other/Not sure,” end survey

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

8. What types of content do you include as OER resources?  
[open response]
9. If you do not include purchased or licensed library resources, why not?

## Appendix C

Call for Affordable Learning Grant

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

*What is Affordable Learning and OER?*

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

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

*To apply...*

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

*Awards*

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

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

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

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

*Application Deadline: Friday, November 13, 2020*