



# **eTexts 101: A Practical Guide**



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DAVID LEWIS



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# Introduction

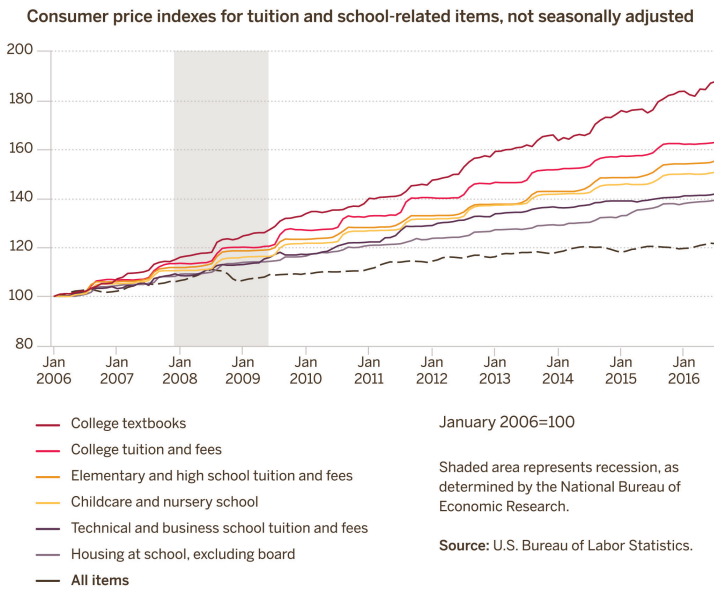
***David W. Lewis, IU Assistant Vice President for Digital Scholarly Communication and Dean of the IUPUI University Library***

“The Rising cost of college textbooks has long been a burden for students, often motivating them to seek creative ways to get around this expense. Though digital textbooks—with their ability to provide cheaper, easier, and better access to content—have been around for years, the use of digital textbooks for academic purposes is still not widespread.”[\[1\]](#)

So began a 2012 case study on the IU eTexts program written by Brad Wheeler and Nik Osbourne. They concluded their article by saying, “The shift to digital course content is upon us as the rise of remarkable consumer devices, interactive content, new software platforms, and new economics pave the way. Colleges and universities have a remarkable opportunity to help determine the prices for digital material that will be with us for many years. Institutions can work directly with content and software-platform providers to vastly reduce the costs of going digital with sustainable, win-

win models. The IU road to etexts illuminates one path for that endeavor.”[\[2\]](#)

By the mid-2000s it was clear to anyone who looked that the textbook market was a mess. A Government Accountability Office (GAO) report in July 2005 documented a 186% increase in textbook costs between December 1986 and December 2004, a period in which overall inflation was 72%.[\[3\]](#) The U.S. Bureau of Labor Statistics documents an 87.5% increase in textbook prices between 2006 and 2016. During this period general inflation was 21.4% and textbook prices increased at a faster rate than any other education cost.[\[4\]](#) These costs are shown in the graph below.



Consumer price indexes for tuition and school-related items, not seasonally adjusted, January 2006-July 2016

The State Public Interest Research Groups, which represent student interests, documented the problem in a series of reports. The titles of the reports make their point of view clear: *RIPOFF 101: How the Publishing Industry's Practices Needlessly Drive Up Textbook Costs*; *Required Reading: A Look at the Worst Publishing Tactics at Work*; *Exposing the Textbook Industry: How Publishers' Pricing Tactics Drive Up the Cost of College Textbooks*; and *Fixing the Broken Textbook Market: How Students Respond to High Textbook Costs and Demand Alternatives*.<sup>[5]</sup> These reports cite publisher practices such as frequent revision, bundling, and other tactics to increase prices

and limit the used book market. Publishers justified these practices by arguing that they faced a market where students would do almost anything to avoid high costs—from the reasonable selling of books in the used market to the less reasonable importing of illegally pirated copies from countries where the costs were lower. In many cases students would go without the textbook, buy it well after the start of the semester, or sell it before the end of term even though it hurt their ability to be successful in the course. A survey by U.S. PIRG shows that 65% of student consumers have opted out of buying a college textbook due to its high price, and of those students, 94% say they suffer academically.[\[6\]](#)

### **Something needed to be done.**

There were some efforts to create open textbooks, most notably by Connexions, now OpenStax, but these efforts had limited reach since they were strategically focused on particular subject areas and large enrollment courses. Other open textbooks have been published on a wide range of topics by individuals or other publishing efforts, yet even then textbooks are not available for every class. In addition, some faculty were concerned about the quality of open textbooks, believed that a commercial textbook option is the best choice for their teaching and their students' learning, or found it difficult to invest the time and energy to develop alternatives. Some faculty wrote textbooks—and a small number made large amounts of money doing so—but in most cases this work was not rewarded by promotion and tenure committees. Universities had left textbook selection decisions

to faculty and delegated to campus bookstores the sale, and purchase and resale, of textbooks.

**The problem was obvious, but what to do about it was not.**

Indiana University decided that action was required and charted the path explored and explained in the following pages.

The key insight, described at length in Brad Wheeler’s chapter “Negotiating with the Family Feuds,” was that the university needed to become a participant in the textbook marketplace in order to create a system that would allow faculty choice, significantly reduce prices for students, and provide a reasonable return to authors and publishers. The IU program’s success stemmed in large part from a clear understanding of the nature of the textbook market (and the reasons for its failure to serve any of the players), as well as a willingness to propose and then implement an alternative. The resulting IU eTexts program took advantage of technology, but technology alone was not enough. The combination of digital technology and a new business model distinguished IU eTexts from other programs. Neither, standing alone, would have been sufficient. The combination saved students millions of dollars (see [The Indiana University eText Experience: Growth of the eText Program](#)). It also created a more stable income stream for publishers, and they have come to embrace this eText approach they refer to as “All Access, Inclusive Access, or Day 1 Access.” Most importantly, it has ensured more students have access to materials that are key to their academic success (see [The Indiana University eText Experience: The Benefits of eTexts for Students and Instructors](#)).

This book has three sections. The first relates the story of how Indiana University developed and implemented its eTexts program. The second section offers perspectives from several publishers who have participated in the program. The third section provides reports from other universities on work they are doing to address the textbook issue.

The IU eTexts program provides a replicable, successful model for how universities and colleges can work with publishers and with their faculty to provide digital course materials in a way that can enhance students' learning experience and will reduce the cost of attendance.

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[1] Brad Wheeler and Nik Osborne, "Case Study 21: Shaping the Path to Digital: The Indiana University eTexts Initiative," in *Game Changers: Education and Information Technologies*, edited by Diana G. Oblinger, EDUCAUSE, 2012, pages 373. <https://www.educause.edu/~media/files/library/2012/5/pub7203cs21-pdf.pdf>

[2] Brad Wheeler and Nik Osborne, "Case Study 21: Shaping the Path to Digital: The Indiana University eTexts Initiative," in *Game Changers: Education and Information Technologies*, edited by Diana G. Oblinger, EDUCAUSE, 2012, pages 380. <https://www.educause.edu/~media/files/library/2012/5/pub7203cs21-pdf.pdf>

[3] United States Government Accountability Office, *College Textbooks: Enhanced Offerings Appear to Drive Recent Price Increases*, July 2004, GAO-05-806, <https://www.gao.gov/new.items/d05806.pdf>

[4] “College Tuition and Fees Increase 63 Percent Since January 2006,” *TED: The Economics Daily*, August 30, 2016, U.S. Bureau of Labor Statistics, <https://www.bls.gov/opub/ted/2016/college-tuition-and-fees-increase-63-percent-since-january-2006.htm>

[5] *RIPOFF 101: How the Publishing Industry’s Practices Needlessly Drive Up Textbook Costs*, The State PIRGs Higher Education Project, 2nd Edition February 2005, [http://www.maketextbooksaffordable.org/ripoff\\_2005.pdf](http://www.maketextbooksaffordable.org/ripoff_2005.pdf); *Required Reading: A Look at the Worst Publishing Tactics at Work*, Make Textbooks Affordable Campaign, October 2006, [http://www.maketextbooksaffordable.org/Required\\_Reading.pdf](http://www.maketextbooksaffordable.org/Required_Reading.pdf); Saffron Zomer, *Exposing the Textbook Industry: How Publishers’ Pricing Tactics Drive Up the Cost of College Textbooks*, Student PIRGs, February 2007, [http://www.maketextbooksaffordable.org/Exposing\\_the\\_Textbook\\_Industry.pdf](http://www.maketextbooksaffordable.org/Exposing_the_Textbook_Industry.pdf); and Ethan Senack, *Fixing the Broken Textbook Market: How Students Respond to High Textbook Costs and Demand Alternatives*, Student PIRGs, January 2014, <https://uspirg.org/sites/pirg/files/reports/NATIONAL%20Fixing%20Broken%20Textbooks%20Report1.pdf>

[6] Ethan Senack, *Fixing the Broken Textbook Market: How*

*Students Respond to High Textbook Costs and Demand Alternatives*, Student PIRGs, January 2014, page 4, <https://uspirg.org/sites/pirg/files/reports/NATIONAL%20Fixing%20Broken%20Textbooks%20Report1.pdf>

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## PART I

# The Indiana University eText Experience: Getting Started

*David W. Lewis, IU Assistant Vice President for Digital Scholarly  
Communication and Dean of the IUPUI University Library*



# 1.

## Background: eText and the eText Program Defined

***David W. Lewis, IU Assistant Vice President for Digital Scholarly Communication and Dean of the IUPUI University Library***

An “eText” is a digital object, usually a textbook but sometimes another type of learning material. (At IU, these include digital learning tools that instructors incorporate to offer interactive instructional materials and adaptive learning experiences for students.) These objects are provided using a specific economic model and a set of systems and practices that compose the “eTexts program.”

The eText as a digital learning object is not unique to the IU eTexts program. Creating digital versions of print materials or creating new learning objects using digital technologies is not

what makes IU's eTexts program unique. What is unique is the economic model and the systems and practices put in place to implement the model.[\[1\]](#)

The Indiana University (IU) eTexts program began and continues with four goals:

1. Reduce the costs of course-related materials for students
2. Provide faculty with the high-quality materials they desire
3. Enable adaptive learning platforms and new tools for teaching and learning—for instance, annotations in an eText that can be shared with other users
4. Develop a sustainable model that works for all stakeholders involved: faculty, students, authors, and publishers

To achieve these goals it was clear that the university, as an institution, needed to become an active player in the textbook market.

Students, the direct consumers, have little or no ability to significantly influence the textbook market. Faculty decide which books are required, and publishers set the prices and terms of the transaction. Students can complain, but they have little power to alter the terms of the deal. They can, and often do, game the system at the margins—but at the end of the day, they have little or no power or influence. When the university enters the picture and negotiates with publishers on behalf of students,



this changes. The university can negotiate with publishers and provide valued services in ways that individual students cannot. The willingness of IU to do so was the first key step.

The next step was to create a new model that achieved the four goals. Two factors made creating a new model possible.

First, most textbooks were available in digital formats, which meant the inherent efficiencies of digital technologies could be captured. As Andrew McAfee and Erik Brynjolfsson put it, digital content is free, perfect, and instant. Once something is digitized, it's essentially free to make an additional copy of it. Once a digital original is created, copies are every bit as good as their digital originals. In fact, the digital copy is identical to the original digital version. Networks allow distribution of a free perfect copy of information goods from one place to another, or from one place to many, virtually immediately.<sup>[2]</sup> Most digital content is, of course, protected by copyright so these attributes cannot always be easily achieved.

Second, the extreme dysfunction of the existing textbook market meant that a different economic model could be created to benefit everyone. Students could pay less, and publishers and authors could earn at least as much as they had been earning (and their income streams would be more reliable).

Digital technologies inherently provide efficiencies and benefits such as cheap and easy distribution of content, the ability to easily modify and update texts, and the ability to include audio, video, simulations and other content that print cannot accommodate. But the challenge is to provide a reading

experience comparable to print and/or provide print-on-demand versions of the text. Students need evidence that the experience with the digital version is as good as or better than reading and studying with the print version of a textbook. Faculty need to be convinced that digital versions of textbooks do not diminish learning. And both want students to have access on all their devices beyond a single semester.

The economic model created was one in which the publishers provided digital content at a significantly reduced price in exchange for having every student in the class pay this reduced fee. Publishers were thus guaranteed a reasonable and reliable return because all of the students in a class are assessed this charge as an eText fee tied to the course. Modeling done as part of the development of the eText program indicated that publishers most likely would get a better and larger income stream than they would selling traditional textbooks—especially given the growing market where used books and rentals decrease the sales of new textbooks.[\[3\]](#)

Importantly, the university would negotiate advantageous terms with publishers and pass the fees along to students. This arrangement created two challenges. The first was to convince publishers that this was in fact a better deal for them. The second was to convince students and faculty that a required universal eText fee, even when it meant lower prices, was a fair arrangement. Modeling of the student side indicated that, while a small number of students who successfully purchased a used textbook and resold it might do a little bit better than the eText

price, on average the large majority of students would pay much less.

Brad Wheeler and Nik Osborne outlined the notable features of the IU agreements with publishers in their 2012 case study.[\[4\]](#)

1. **Extended Access to eTexts** — Students will be able to access their eTexts for as long as they attend the university (as opposed to having the content disappear after a set time—e.g., after three to six months).
2. **Elimination of Print Restrictions** — Students are able to print as many pages as they want from an eText and may also request a print-on-demand version of the textbook for a small fee.
3. **Significant Cost Savings** — The IU agreements focus on providing eTexts to every student at a cost similar to what students would pay if buying and selling back a used textbook—equal to about half the price of an eText available in the marketplace.
4. **Multiple Devices** — The agreements with Courseload and the publishers allow users to access the eTexts via multiple devices (laptop, tablets, smartphones, etc.) both online and offline.
5. **Uniform Access** — Through its agreement with software provider Courseload, the university has eliminated the need for students and faculty to download and learn multiple software platforms to access eTexts; instead, one platform is used to access,

read, and annotate all eTexts, and one username and password are used to access the platforms (the same username and password students and faculty use to access Oncourse, IU's learning management system).

The model had one other key component. The platform used to provide the eTexts was managed by the university. This meant that there was a single platform rather than multiple publisher platforms. In turn, this meant that students had a common experience with all of their eTexts, and integration with the course management system was simpler. Importantly, this also meant that the university controlled the data generated by the platform and could use it appropriately for assessing teaching and learning.

It is important to distinguish the IU eTexts program from digital textbook programs offered by publishers. In most cases, publishers charged more than the IU eTexts price for their digital textbooks. And in most cases the publisher's digital textbooks were only available to students in the semester they took the class. This is a particular disadvantage in cases where introductory textbooks become important references as students advance in their programs, or where students need to take certification exams upon completion of their studies.

The impetus for the eText project came from Brad Wheeler and the Office of the Vice President for Information Technology. An important factor early on in the project was the fact that IU's 2007 agreement with Barnes & Noble as the exclusive physical location for the sale of textbooks did not include an exclusive right to sell electronic content. This meant that the eText project

could proceed without consent from the bookstore. This made it possible to explore the eText model without having to be concerned about the potential for a turf battle with the campus bookstore.

As this book explores in more detail later, eTexts also have a number of pedagogical advantages. First, the eText is available to all students on the first day of class (IU also has a similar goal for providing accommodated textbooks via its Assistive Technology and Accessibility Centers). This may seem like a small thing, but it is not. In addition, research conducted as part of the IU eTexts initiative shows that many students find eTexts more convenient and appreciate their interactive features.<sup>[5]</sup> When the program initially rolled out in 2011, there were concerns about student acceptance of the digital reading experience and their ability to comprehend and absorb content as well as they could with print textbooks. This has become a non-issue as the eText platform has become more robust and student use of various digital platforms—from computers to tablets to phones—has become ubiquitous. And IU’s Assistive Technology and Accessibility Centers (ATAC) worked with software providers, national organizations, and publishers to ensure that content could be available for all students.

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[1] A good description of the genesis of the program can be found in, Brad Wheeler and Nik Osborne, “Case Study 21: Shaping the Path to Digital: The Indiana University eTexts

Initiative,” in *Game Changers: Education and Information Technologies*, edited by Diana G. Oblinger, EDUCAUSE, 2012, pages 373-380. <https://www.educause.edu/~media/files/library/2012/5/pub7203cs21-pdf.pdf>

[2] Andrew McAfee and Erik Brynjolfsson, *Machine Platform Crowd: Harnessing Our Digital Future*, New York, NY: W. W. Norton & Company, 2017, pages 135-136.

[3] Alan Dennis, “Textbook Pricing Analysis,” May 2009, <http://hdl.handle.net/2022/22013>.

[4] Brad Wheeler and Nik Osborne, “Case Study 21: Shaping the Path to Digital: The Indiana University eTexts Initiative,” in *Game Changers: Education and Information Technologies*, edited by Diana G. Oblinger, EDUCAUSE, 2012, page 377. <https://www.educause.edu/~media/files/library/2012/5/pub7203cs21-pdf.pdf>

[5] Serdar Abaci, Joshua Quick, and Anastasia Morrone, “Student Engagement with e-Texts: What the Data Tell Us,” *Educause Review* October 9, 2017,

<https://er.educause.edu/articles/2017/10/student-engagement-with-etexts-what-the-data-tell-us>

## 2.

# How the IU eTexts Program Works

***David W. Lewis, IU Assistant Vice President for Digital Scholarly Communication and Dean of the IUPUI University Library***

In this section, we describe key aspects of the IU eTexts program and the importance of each of these aspects.

1. The university negotiates contracts with publishers. These contracts allow the university to provide student access to digital textbooks and related content at significantly reduce prices. The university pays the publisher for every student enrolled in a course section that uses an eText.
2. The university maintains a catalog of textbooks and other content that is available via the eText program.

3. Faculty can opt to select an eText for their course or ignore the program (it is an additional option for them). This is done sufficiently in advance that students know a course they are registering for is using an eText, and they will therefore be charged a course fee to cover the cost. They can thus take the known course materials cost into account as they plan their class schedule.
4. Publishers provide texts in a format that is compatible with the university's eText reader/annotation software platform. While most of the content in the eText program is produced by publishers, faculty-produced items or open content can be included as well.
5. The content provided by the publishers or from other sources is uploaded to the eText platform. IU uses [the Engage platform](#) that is part of the Unizin suite of services. This system provides standard features for annotating texts and sharing annotations, works on a wide range of electronic devices, and addresses accessibility issues. There are other options available such as the one provided by Red Shelf (see: [about.redshelf.com](#)).
6. The Bursar's Office manages eText charges and the resulting payments to publishers. Their system accommodates drop/add and other similar issues. For example, they have accounted for federal rules requiring that students who receive federal aid have the option to opt out of the eText program. (IU gives all students the option.)



7. The eText is available on the first day of class (often weeks before) and students have access to the content for as long as they are students at IU. Students can also print selections from the eText or order full printed copies of the text for the cost of printing.
8. The eText program is described to students registered with disability services in their intake interviews. Students are informed about how IU eTexts are accommodated and how to get training and support for using the IU eTexts platform with their assistive technologies. See [suggested] section 1-J for more details on the accessibility and accommodations of the IU eText program.
9. Faculty and students can highlight and annotate the text and share these highlights and annotations with the whole class or subgroups. IU research has shown that faculty annotations are a particularly powerful way to engage students with the text.[\[1\]](#)
10. The platform captures usage data for analyzing how students interact with the platform and how that interaction impacts their academic performance.

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[1] Visit: <https://er.educause.edu/articles/2015/2/instructor-engagement-with-etexts>

### 3.

## Growth of the eText Program

*David W. Lewis, IU Assistant Vice President for Digital Scholarly Communication and Dean of the IUPUI University Library*

The table and figure below depict the growth of the Indiana University eTexts program. From modest beginnings, the early initiative has grown to a several million-dollar program.

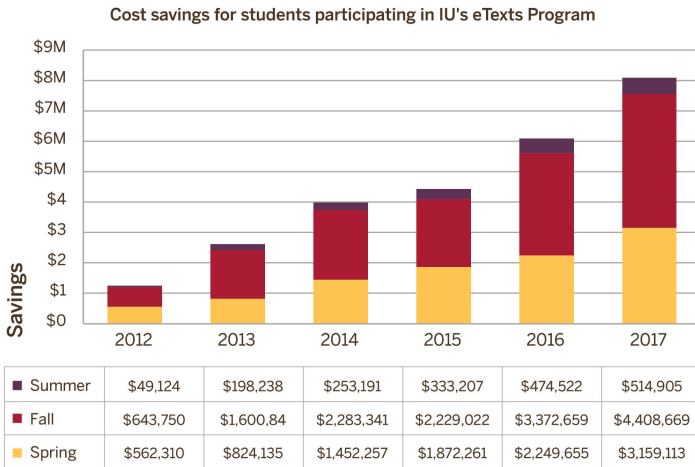
E-text adoption at Indiana University (2012–2017)

	2012	2013	2014	2015	2016	2017
Course sections	328	679	1,166	1,714	2,279	3,020
*Adoptions	690	1,167	1,751	1,912	2,590	3,390
Unique faculty	202	441	600	733	996	1,307
Unique students	5,407	14,710	24,352	34,403	47,899	61,594
<b>**Total students</b>	<b>12,251</b>	<b>24,290</b>	<b>32,923</b>	<b>48,814</b>	<b>67,327</b>	<b>92,431</b>

\* *Adoptions* refers to a single course item (e.g., digital book, and a section may have one or more).

\*\* Includes multiple counts of students as they may enroll in more than one e-text course in a term/year.

## eText adoption at Indiana University (2012–2017)



## Real cost savings for students participating in IU's eTexts Program

The IU eTexts program began in the fall of 2009 as a subsidized pilot program. It expanded to all IU campuses in the spring of 2012. In 2017, over 61,594 students—or 53.4% of IU’s approximately 115,000 students on all eight campuses—used at least one eText. eTexts were used by 1,307 unique faculty in 3,020 class sections, accounting for 3,390 adoptions of a digital text.

Real savings generated by the program in 2017 reached nearly \$8.1 million, up from a little over \$1.2 million in 2012.<sup>[1]</sup> This is a direct reduction in the cost of attendance.

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[1] The discounted savings is the retail cost of the printed text less the eText price divided by two. The latter step adjusts for the fact that most students try to avoid paying full retail prices. While this is an inexact measure, we believe it is a good approximation of the savings accrued by students as a result of the eText program.

## 4.

# The IU eTexts Timeline

*David W. Lewis, IU Assistant Vice President for Digital Scholarly Communication and Dean of the IUPUI University Library*

## 2009

Initial assessment of 20 high-enrollment courses — including science, business, and English — gathers quantitative information about the cost of textbooks for IU students.

Pilot program begins with the university and publishers subsidizing the first three semesters of the pilot. Students receive eTexts at no cost during this evaluation period.

Courseload, an Indianapolis based e-reader provider founded by Mickey Levitan, supplies the reading software.

VP for IT & CIO Wheeler meets with faculty authors, student

groups, faculty councils, etc. to assess the problem and solutions.

## 2011

**February** — eText program kicks off with townhall meetings at IU Bloomington and IUPUI.

**February** — IU releases Request for Proposal to publishers.

**September** — IU signs agreements with John Wiley & Sons Inc., Bedford Freeman & Worth Publishing Group, W.W. Norton, Flat World Knowledge, and McGraw-Hill Education.

**September**—IU President Michael A. McRobbie approves the eText program rollout to all campuses.

## 2012

**January** — Spring semester is the first full semester of IU's eTexts Initiative: 5,300 students in 127 sections use eTexts.

**January** — The Indiana University Press joins the IU eTexts program.

**February** — Harvard Business Publishing joins the IU eTextsprogram.

**May** — Pearson joins the IU eTexts program.

**June** — IDG's CIO magazine honors Indiana University as a recipient of the 2012 CIO 100 award based on the eText program.

**September** — Elsevier's Science & Technology Books joins the IU eTexts program.

## 2013

**January** — In the spring semester, nearly 10,000 students in 250 course sections are using eTexts. Comparisons show that amounts to \$200,000 in total savings over next-best options.

**March** — Cengage Learning and SAGE join the IU eTexts program.

**May** — IDG's Computerworld Honors Program names Indiana University as a 2013 Laureate for its eTexts initiative.

**May** — Courseload, Inc. and Indiana University are gold recipients of the IMS Global Learning Consortium's Learning Impact Awards for the eText initiative.

## 2014

**September** — IU expands its eText contracts with McGraw-Hill

Education and Pearson to include more titles at better pricing and expand access to digital learning tools.

## 2015

**July** — Unizin acquires the Courseload software. IU migrates, without interruption, from the Courseload system to the Unizin system.

## 2016

**September** — IU's pioneering eText initiative surpasses \$10 million in total revenue, having grown to more than 40,000 students in the last academic year.

The program is accelerating with more than \$1 million in year-to-year growth and 1,350 available titles. Fall semester alone totals \$3 million, with more than 27,000 IU students having at least one of 55,000 licensed eTexts.

## 2017

**February** — Unizin and Cengage partner to make all of the latter's digital course offerings available to Unizin's member institutions as part its eText program.



## 2018

**February** — As part of a Unizin contract, IU gets a new deal with McGraw-Hill that provides for a \$35 flat price for the eText version of any McGraw Hill eText and either \$50 or \$60 for one of their adaptive courses including interactive tutorials, homework grading, etc.



## PART II

# The Indiana University eText Experience: The Economics

*Brad Wheeler, IU Vice President for Information Technology and  
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## 5.

# Negotiating with the Family Feuds

***Brad Wheeler, IU Vice President for Information Technology and Chief Information Officer; Professor of Information Systems, IU Kelley School of Business***

Count me as optimistic that we can dramatically reduce the costs of required, digital course materials in 2018 and beyond. The publishers are now aligning to the compelling win-win economics of eTexts and “Day 1 Access” models at an accelerating pace.

As we all celebrate this favorable development, we must stay focused on addressing the root causes of the dysfunction that got everyone into the sorry state of high priced books. The history of how we got to this moment is instructive as students, faculty,

staff, authors, and publishers work to re-envision and implement a rational model. Before 2018, the main family feud for pricing was within the publishing companies themselves, but now the feud is more acute within our colleges and universities. The reasons for the dueling feuds within the publishers and within our institutions are remarkably symmetrical, and each can be resolved by letting go of legacy sales and distribution models that have long outlived their economic value.

This chapter addresses the role of contracts, negotiations, incentives, and the purposeful reengineering of an industry in the age that increasingly favors digital course materials. It chronicles some of Indiana University's (IU) lessons from 2009 forward and the intransigent, structural reasons that have taken so long to get to a new model. It concludes with guidance for institutions that are ready to reduce the cost of attendance. It addresses contracting for paid course materials, and I'll affirm here again that Open Educational Resources (OER) can be a powerful means to reduce the cost of attendance when available. Yet, until these resources are able to meet more course needs, we must concurrently work to address the prices of course materials from publishers.

### **Buyer and Seller without Middlemen – 2009-2011**

IU envisioned a model where students paid less and creators got fairly paid for each use of their content. By creators, we meant both authors and publishers, and we sought to reduce the number of middlemen seeking to get paid by adding additional profit to the price of digital course materials. We did the modeling and had a strong case to present a new model that essentially “moved

the toll booth” to the university bursar so that creators would get paid for each enrolled student who used their digitally delivered course materials.

In the spring of 2009, IU requested and received visits by delegations from the big three publishers (Cengage, McGraw-Hill, Pearson), who accounted for more than 64% of the dollar volume of all required course materials at IU (the big five commanded 72% of the dollar volume). All were very quick to explain to us that they were no longer “publishers,” rather, they had become eLearning companies. We said great, we want to buy a bunch of that in digital form—whether digital versions of paper books or adaptive exercises. Give us a great deal, and we’ll pay you for every use of your content. Sounds great...right?

We viewed the deal as having two parts. First, we only wanted one eReader/Annotation piece of software to promote and support for students and faculty. We thought it a bad idea if a freshman had four different pieces of software just to read five different books. Thus, we licensed the software at IU for use with any content from a third party. Second, we rigorously negotiated with the publishers to give us the lowest possible price with no embedded software or distributor costs. From late 2009 through early 2011 IU subsidized four semesters of small but growing trials with some content also contributed by publishers as we all worked out the plan.

Then came the formal Request for Proposal in March 2011. We were all ready to march forward with big new deals as we had support of students and faculty, positive pilot trials, bursar

billing, and all was ready. We sat by the mailbox and waited for the responses. And waited. And waited.

What? How could the publishers not accept a collective increase in revenue for their products over the current failing traditional model? We did receive some dead-on-arrival responses. They sought price points in the 50-75% of list price range and heralded a “50%” discount off the made up and often ridiculous list prices of books. As noted in earlier sections of this book, the run up in list prices was largely driven by seeking greater revenue from an increasingly failing model that only addresses part of the market. IU sought flat pricing or a subscription deal for an entire publisher’s catalogue, but that was a bridge too far (until 2018). The entire industry was premised on maximizing list price and then discounting to wholesale bookstore distribution channels.

We were at a stand-off that lasted for several months. Finally, Tom Malek, then with McGraw-Hill and now with Pearson, met me in Indianapolis and we cut a deal at 35% of list price (65% discount). Four smaller publishers were ready, but they would not move without one of the majors going first. Pearson walked away but came back and took the same terms the next summer. Cengage took another two years as they kept holding out for a higher price to students, and we just left them to the retail market without getting paid for each use of their content. A turnover in executives there brought them in quickly to sign on to the same terms. Our adoption numbers accelerated, and we eventually signed 25 publishers. Elsevier, law, and other health publishers remain holdouts in early 2018, as the structure of the



market for their books to support post-graduation credentialing exams (the Bar Exam, Nursing License, etc.) tends to have the characteristics of a more biased monopolistic or oligopolistic market. Thus, unlike other publishers, they face less competition and have fewer real incentives to improve their pricing to students who have very few choices for substitutes.

Throughout this period and to today, IU does not mark up the costs of the materials that it negotiates for on behalf of students.

### **Economics and Incentives – 2012-2016**

One of our early lessons is that we were not negotiating with an individual at a company. Even when the individual was a very high-level executive, we slowly came to understand that we were really negotiating with an internal family feud. The incentive structure and bonus compensation for various sales executives, product managers, division heads, etc. was a complete mishmash of unaligned incentives in a firm. Consider the following example of the traditional textbook sales model:

If there are 100,000 students in the US taking an *Introduction to Marketing* course, and the most popular book has a 75% market share, you would assume expected sales of around 75,000 books a year. That book lists for \$187 and the publisher charges various book resellers around 60% of list or \$112. In the first year of the new edition of the book there are no direct substitutes, so if 95% of the students bought the book, publisher revenue would be  $75,000 \times 95\% \times \$112 = \$7,980,000$ . In year two, there would

be an abundance of used books, so new sales may fall to 30% of the market (\$2,520,000), and by year three down to 15% of the market (\$1,260,000). The three-year maximum revenue to the publisher would sum to \$11,760,000, but publishers have to reduce that number by returns from resellers, sales commissions, author royalties, printing and distribution, and other cost of sales deductions, so let's generously call it \$10M in net revenue on 105,000 actual book sales in a potential three-year market of 225,000 students.

Since the costs to write, edit, and publish the first copy of a book in digital or print form are largely the same, the best economic analysis is on revenues and costs for all sales *after* the first book. If a publisher's cost to print, warehouse, and ship a book is \$10 (and it is much lower than that), then a wholesale price of \$112 appears to have a gross margin of \$102 per book. Thus, every year, the publisher's financial statements would show it has a continuing strong gross profit margin on each sale, though total revenue is falling quickly as students rationally seek substitutes in used books or other means. Used books are a perfect substitute for buying a new book, and since they are much less expensive, students are strongly incited to seek substitutes for new books in the traditional model.

Now consider a different approach. At what price would a publisher need to sell the book in an eText model where 225,000 students each were bursar-billed for the book?  $\$10,000,000 / 225,000 = \$44$  per student to achieve *the same net revenue to the publisher*. Win-win. The publisher got the same revenue, all the

students have the course materials, and the cost fell to 23.5% of the made-up list price.

The financial statements for the publisher, however, would look much worse compared to prior years as the gross profit margin falls to \$44 less cost of digital distribution (say \$5) yielding \$39. This is far short of the appearance of \$102 gross margin—a reduction of 56%. Of course, this is all quite ridiculous: By driving for a high margin on a diminishing part of the market each year or a smaller margin on the whole market, the publisher is in the same net cash position. Yet that was just part of the internal family feud at most publishers. Bonuses were tied to the traditional model metrics, and that drove behavior.

While either of these scenarios yields similar profit outcomes for the publishers, the total costs to students could not be more different. In the traditional publishing and distribution model, students switch to used books and resell over the three-year cycle. Our analysis shows that the 225,000 students in the traditional model, including used books and sell-backs, would have paid over \$21,000,000 or an average of \$95 per book—though publishers only receive a fraction of those funds because of the used book market, reseller fees, shipping, and other costs of goods sold. Students in the eText model would have paid a total of just over \$10,000,000, or \$45 per book, and nearly all funds are transferred to the publisher, with substantial savings to the student. In both cases, the publishers received the same total money, though students spent less.

IU spent much of 2012-2017 working with the revolving set of publishing executives as we kept trying to enroll more

publishers in this win-win model for both content creators and content consumers. We had publisher sales representatives calling on faculty at IU and urging them not to use the eText contract that IU had signed with their company. It was crazy, yet our adoption numbers and (pass-through) revenue in the eText program continued to accelerate.

This period also saw a rise in textbook “rental programs” and so-called eText rental programs, which allow a student to rent a physical book or eText for a set period of time, normally one semester. I view both of these as marketing bandages on a wounded economic model rather than longer-term solutions. Rentals are no more than a marketing label for new/used books with a guaranteed buy-back at a known cost of ownership. They absolutely do not address the root cause of the failing traditional model, do not pay content producers for their work, and do not achieve the lowest possible prices for students. Likewise, the concept of an “eText Rental” has nothing to do with the real costs and educational value in an industry. Why should we encourage students to take a lower-cost, one semester eText Rental if the course spans a whole year? The real cost of providing continuing access to digital content for a few more days or years is negligible. I view both of these as highly distracting Siren Songs that reward 3rd party resellers over students and institutional goals.

This period also saw a maturing and growing popularity of Adaptive software for courses (e.g., Pearson MyLabs, McGraw-Hill Education ALEC, etc.). Adaptive content is cloud-hosted software by a publisher, and its development and operational

costs per student are higher than a physical book or digital version of the same book. Many publishers were making extraordinary investments in building the so-called “Robo-tutors” as a strategic bet.<sup>[1]</sup> With only a single provider, these systems took on the pricing characteristics of a monopolistic product — students had no real substitutes if these were required for a course and homework was graded by them.

Throughout this period, IU renewed its contracts with about 25 publishers, and in each case, we were able to demonstrate reliable, growing, and aggregate sales volume to gain slightly improved pricing each round. We included Adaptive in our renewed contracts, and often that was at a flat price with some discount relative to any other means of students gaining access to it.

## **The World Changed — 2017**

Then the world changed. Shares of Pearson PLC had already lost 50% of their value from early 2015 to late 2016. By early January 2017, they had shed another 20% of their December 2016 high, and this period portended a rapidly accelerating shift in the mindset of most of the publishers. All of a sudden, publishers were now aggressively driving—not acquiescing to—the eText model and began branding it as “All Students Acquire” or “Day One Access.” Both of those terms appeared at multiple publisher booths at the 2017 EDUCAUSE Annual Meeting in Philadelphia. More executive exits, shifting political victories within the publisher family feud, and greater

willingness of institutions to act on bursar billing were all fueling the change. The major campus bookstore chains had also rolled out versions of the program, but they tacked additional profit margin on each book for their middleman status that again upped the costs to students.

These changes in the publishers' mindset coincided with maturing acceptance of digital by faculty and students and growing pressures to reduce the cost of attendance. Major online book sellers and rentals were also putting pressure on the industry for change. Several of the publishers also moved to an "Agency Model" where they stopped selling books for selected courses. Instead, they would provide those books to distributors who each rented them out to students at a maximum set price for which the distributors received a publisher-paid commission on each rental. Demand for Adaptive course materials accelerated, particularly for large general education courses.

### **Peace within both Families 2018-**

It has never been easier than now for an institution to assertively reduce the cost of attendance by helping its students acquire digital course materials at the most favored prices. Unfortunately, what I often see is an abundance of administrative action that fails to actually seek the most favored prices for students as colleges and universities acquiesce to other distracting objectives that yield higher-than-necessary costs on students. Thus, as new leadership at many publishers has made peace with their internal family feud, it is also time to do so

within the academy by affirming our twin goals to reduce the cost of attendance and improve learning outcomes (covered in following chapter *The Benefits of eTexts for Students and Instructors*) and then pursuing them without distraction.

I see four paths forward in order of decreasing attractiveness:

1. Participate in a consortium to manage the contracts and aggregate scale
2. Negotiate directly with each publisher (as IU had to do in the early days)
3. Access the model through resellers/bookstores at a higher cost to the students
4. Do nothing and let the retail model prevail

The first three paths necessitate that an institution be willing to collect course material costs directly from students via bursar billing. It is the essential trade (almost) every student acquires and pays in exchange for substantially lower course material costs. Most institutions have long had various course fees, and the technical lift to establish these fees for eText and related policies is now well understood. Choosing a path for contracts is the next hurdle.

If a marketplace has 10 providers and 10 consumers, a set of individual relationships would yield 100 separate contracts, and that would not be efficient for anyone. Thus, to continue to go it alone in option #2—as IU did in our founding of the eText program—is not advised. Even the largest amongst us has trivial scale in the whole of higher education. IU chose this path as

none other was available at the time, and we were willing to invest substantial negotiating and contracting efforts to establish the model. I am grateful to Jill Schunk, Associate Vice President of IU Procurement Services, for her help and tenacity as we pressed forward with direct negotiations. IU is quite fortunate that wise people before me chose to exclude digital content from our outsourced bookstore agreement in 2007.

By 2017, IU was assertively moving our eText agreements to the member-owned Unizin Consortium (Unizin.org). Unizin has the scale of over 800,000 students and makes an efficient basis for publishers to contract with Unizin as an entity and for member institutions to contract with Unizin. As a not-for-profit entity, Unizin is an excellent aggregator for its members, and there is no reason that other state consortia or other alliances couldn't also aggregate scale for an efficient execution of option #1 above.

The outsourced bookstores path (#3) also aggregates scale for contracting with publishers. Since they are a for-profit business, they rightly choose to make a profit on course materials in all models and pass that cost on in higher prices to students. At some institutions, they may also serve as a transfer mechanism for money from student purchases to various accounts within the university. If profits on student course materials are a key institutional objective in the form of a transfer payment from books to some other worthy program, then this could also be transparently achieved through other mechanisms of a university mark-up on eText prices. The challenge, of course, is that adding cost on course materials to transfer payment for other uses works against the goal of reducing the cost of attendance.



The most worrying path is the default inaction of #4. By definition, it means that inaction by institutions subjects students to the retail pricing market. Institutions lose all real possibility of aggregating learner analytics across publishers, and students will be compelled to pay more than is otherwise achievable in the win-win eText model. Staying with the traditional model also incentivizes students to consider not buying the course materials or to use prior editions. These choices generally work against improving learning outcomes, and they are quite avoidable with institutional action.

Finally, there are the terms of the contract itself whether negotiated by a consortium, the institution, or a reseller. At minimum, and in our experience, a deal with a publisher should include all of the following on the most favorable terms possible:

1. Highly favorable prices relative to *any* other means of legally accessing the material.
2. Ongoing access to the content for at least as long as the student is enrolled at the institution.
3. An ability to print.
4. Access through an institution-selected common eReader/Annotation software to reduce support and training costs at an institution.
5. All data from clicks of reading or working through Adaptive Tutors available to an institution.
6. Ease of management for allocating student access within courses and sections to digital materials.

7. Efficient and quick access to unlocked PDF copies of textbooks, as needed, for university assistive technology and accessibility centers to accommodate textbooks for students with disabilities.

We have achieved these in IU's early years, and we are now achieving them through our consortium. Your institution can too. And it should. It is win-win for both content creators and content consumers.

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[1] For more on "Robo-tutors" see: Steve Kolowich, "Score One for the Robo-Tutors," *Inside Higher Ed* May 22, 2012, <https://www.insidehighered.com/news/2012/05/22/report-robots-stack-human-professors-teaching-intro-stats> or Issie Lapowsky, "This Robot Tutor Will Make Personalizing Education Easy," *Wired* August 26, 2015, <https://www.wired.com/2015/08/knewton-robot-tutor/>

## 6.

# The Role of Physical Bookstores for eTexts

***Brad Wheeler, IU Vice President for Information Technology and  
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For many colleges and universities, no topic is more mobilizing or constraining for an eText initiative than the goals, opportunities, and constraints of the campus bookstore. Two questions can provide essential clarity:

1. What role should a physical bookstore play in the transaction between digital content creators (publishers) and content consumers (students)?
2. What is the cost and value to students of this role for the bookstore?

Institutions with clear answers to these questions will have greater clarity in shaping their eText initiatives. Without goal clarity, a proposed eText initiative and the bookstore risk becoming an internal proxy for conflicting institutional goals—the internal “family feud” from the previous section.

### **The Economics of Goals and Sourcing**

There are certain retail operations and inventory for which a campus bookstore in a great location with high traffic is ideal. Those may include sales of university sweatshirts, memorabilia, sundry goods, a café, and other unique or convenience items. They may also include large inventories of new and used books per the requests of the faculty, and bookstores may play critical roles in gathering course materials requirements for each section. Bookstores require capital investment, skillful management, space, and staff to operate, and all of these costs must be recovered in mark-up on the costs of the items they sell if the goal is to lose no money or to possibly make money.

Over the last 15-20 years, many, but not all, institutions have chosen to get out of the business of owning and operating their bookstores. Several large chains generally won most of the outsourced deals, and they brought relationships with publishers, warehousing and distribution for physical goods, expertise, branding, and cash upfront to take over campus bookstores under sale or other contractual arrangements. Institutions ridded themselves of trying to run a business that was not their strength, received a large cash payment up front, and an ongoing revenue

stream from some fixed or profit-sharing arrangement on sales in exchange for some terms of exclusivity.

Institutions leased space and a campus brand by entering into a mutually valuable contract with an experienced operator, and those contractual terms for the deal were often established via a rigorous bidding process. This proved to be a winning formula for most everyone, and retail pricing of books was constrained by a growing online market and alternative places to acquire books just as Amazon and others do for most goods.

The figure below provides a matrix to illustrate the monetary institutional goals with the sourcing approach of insourcing or outsourcing the physical campus bookstore.

Campus economic goal:	Insource/Own	Outsource
Lose no money	Campus auxiliary	Coop
Make money	Campus business	National chains

Matrix illustration depicting the monetary institutional goals with the sourcing approach of insourcing or outsourcing the physical campus bookstore

For many institutions, however, outsourcing deals were signed before institutions gave much thought to digital course materials that required no warehousing, retail shelf space, or other typical strengths of physical stores. Some even gave “exclusive rights” for digital for more than a decade in exchange for payments to

the university. These were not unusual deals as institutions often sell rights to advertise in their sports facilities, and institutional payments from the outsourcing deals may provide critical funds to pay for operations or valuable programs within an institution.

Yet... the point is clear. If publishers will sell to the students through an institution with an inclusive access or other bursar-billed model (and they will), a model without markup will yield a lower cost to students for the same materials than a model with an additional profit incentive. Since digital materials are dynamically provisioned for digital access when students add a course, there are fewer value-adding roles for physical bookstores even if they operate websites as an additional sales channel.

To illustrate, one 2018 eText deal for multiple institutions has this in its public announcement:

<b>Resale on Campus</b>
Prices provided will be wholesale; additional markups through campus bookstores may apply.

Public announcement example warning of possible resale price increases at campus bookstores

Thus, if a profit motive leads to added mark-up through campus bookstores or other middlemen in a digital transaction, an institution is overtly legitimizing a higher cost of attendance

than could otherwise be achieved. The money received is a compelled transfer payment from students to bookstore owners and in all likelihood, with some revenue-sharing with the institution.

It is very important to distinguish bookstore and institutional profit sharing arrangements on non-compulsory sales from required, bursar-billed eTexts fees. Students have choices in where they buy new or used textbooks, sweatshirts, pencils, and coffee. It is an entirely different matter, however, if students are compelled to subsidize an economic model that is incapable of offering bursar-billed pricing at the same or better price than an institution could otherwise achieve for its students. The markup difference is a compelled and often not transparent transfer payment from students to somewhere.

## What to Do?

Step one is to clarify an institution's goals. Indiana University's eTexts program has four clearly stated goals, including reducing the cost of course materials chosen by faculty. With the unwavering support of the IU administration and faculty, we have pursued not just reducing, but *minimizing* the cost of digital course materials. We do so by not adding a markup via middlemen in the program.

If an institution has a reason to need a transfer payment as a markup on each eText, then step two is to assess how that should be achieved. It could be done by adding \$1-2 to each bursar-

billed eText fee or through an outsourced bookstore arrangement that usually marks up based on a percentage then makes an aggregate payment to an institution. Both are credible means to achieve the same goal.

Once institutions are crystal clear on their goals with all the decision makers, they can then assess any opportunities or constraints for their choices of the “Four Paths” at the end of the section on publisher negotiations. The most frequent constraint is that an institution intentionally or unintentionally constrained its options with a bookstore outsourcing contract. I have heard many accounts from colleagues who fell under extreme pressure from an outsourced bookstore to continue or to give them exclusive rights and markups on digital course materials with some payment to the institution.

In the end, contracts have terms, negotiations, re-negotiations, and exit clauses, and each institution will need to assess who is really its customer and its goals for a campus bookstore.



## **PART III**

# **The Indiana University eText Experience: Recipe for Success**



## 7.

# Rolling Out an eText Program: Communication and Education

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### Challenging the Archetype of the Traditional Printed Textbook

Communicating about new initiatives can be challenging, regardless of the topic or the size of the institution. If the audience is familiar with the topic being communicated (or otherwise believes they are familiar with the topic), the challenge in having them not only read but also understand the

information in your communications can be, ironically, more difficult. In the case of eTexts (i.e., communicating a new eText program), the irony of this challenge is thrown into sharp relief: the concept of the traditional textbook is deeply ingrained in the faculty script of teaching and learning, so messaging about an eText initiative could easily be misconstrued as simply sharing another way to purchase otherwise traditional course materials.

The key to rolling out an eText program is to socialize, socialize, socialize. It is essential that communication announcing a new eText initiative be viewed as part of a larger socialization process, where it's clearly understood by the project team (more on this below) that the very concept of an eText—not just the technology—represents a *cultural* change.

### **Encouraging Change Through an Inclusive Socialization Process**

How, then, is the perceived cultural change of eTexts best addressed? Communication through now pervasive electronic channels (e.g., email, listservs, social media) is important. However, these channels are again only one aspect of the larger socialization process that must serve as the underlying framework of an inclusive eText implementation strategy. A strong leadership team, with a focus on communication and education, is essential.

### **Socialization Through Empowered and Authoritative Faculty**

## **Leadership**

The term eText will initially suggest, to many faculty and students, that it is just a technology issue. Moreover, if much of the early communication is sent by individuals/groups who are not in faculty roles—for example IT administrators, support staff, or publishing reps external to the university—the tendency for many faculty and students will be to view those communications as at best a novelty, or at worst something to be ignored. Therefore, initial communications about eTexts should be delivered by leaders who are empowered via their academic/university leadership positions (such as provosts, deans, other administrative appointments), or are widely recognized as authorities of successful change management based on their understanding of technology, teaching and learning, and history of project leadership either within and external to the university.

## **Socialization Through Frequent Communication To and Solicitation of Faculty**

Again, communication through a single channel is, at best, nominally successful in reaching the broadest audience; this is frequently true in a decentralized university environment where any communication that even hints at a “top-down” change process is anathema to faculty. Therefore, and especially with a topic like eTexts that could be perceived as a challenge to long-established tradition, it is crucial that faculty be “met where they are” both literally (e.g., departmental meetings, faculty committees, etc.) and figuratively (i.e., their comfort level with

technology, willingness to consider a change to their instructional strategies, etc.). And, it is equally critical that faculty are *frequently* met where they are, to keep the central message of the eText initiative at or near the top of the ever-growing list of issues they can give some attention. Also, frequent interactions with faculty, and in a variety of venues and contexts, provide communication leaders with multiple opportunities to solicit feedback, answer questions, and dispel myths and rumors surrounding eTexts.

### **Socialization Through Faculty Choice**

As noted above, it is rare that any type of initiative/change process will be successful if it is overly-prescribed/presented via a top-down implementation strategy. Any type of initiative perceived as a challenge or threat to long-established tradition will absolutely and quickly fail if faculty feel they are being forced to accept it. Therefore, one of the key messages in these frequent and varied eText communications to faculty should be that adoption of eTexts is *an option* and not a requirement. Some individual departments or schools may find that having all their faculty adopt eTexts is most conducive to their teaching and learning mission, or more effectively facilitates the associated administrative and operational facets of that mission by streamlining textbook orders or facilitating updates to curriculum. However, any type of eText adoption mandate should be made *exclusively* at the school or department level.

## Rolling Out the eText Program at Indiana University

In rolling out the eText program at Indiana University, we set out to reach as many groups as possible to explain the new eText program and to provide ample time for questions during each session. We actively requested time with students, faculty, administration, faculty governance, and trustees. The student government groups were eager for some relief from the high cost of textbooks and embraced this new model that would lower their textbook costs. Faculty were initially concerned that they would be required to use an eText and that they would lose the ability to choose their textbook of choice. The IU eTexts program has always been completely voluntary and it remains that way today. Faculty can choose to use an IU eText or they can continue to order their textbooks through the official university bookstore.

Another frequent concern was whether faculty and students could print some or all of the eText. This was key to the early success of the program because faculty and students could choose to print up to 50 pages at once (about the length of a typical textbook chapter) and/or they could order a low-cost, print-on-demand (POD) version of the entire book. In practice, very few students or faculty print their eTexts, but we continue to provide print options for people who do not want to read their eText on a digital device.

When we started the program, we also made it clear to publishers that their prices must be generally equal/better than the net cost of buying and selling a used textbook. (Chapters [The Indiana University eText Experience: Negotiating with the](#)

Family Feuds and The Role of Physical Bookstores for eTexts cover the economics of this model.) And, we wanted a common e-reader platform for reading/annotation and online/offline access. We use Unizin Engage as our e-reader platform, which is available through the Canvas LMS at IU. (This video provides a brief overview of the features of Unizin Engage: “[Rolling out an eText program: Building Support with Faculty and Students.](#)”<sup>[1]</sup>)

While every eText program rollout will differ based on the unique characteristics of the institution, there are key support issues that must be addressed in order to build both faculty and student confidence in the benefits of the program.

### **Guarding Against Assumptions: The Potential Intimidating Quality of eTexts**

Consumer devices like Amazon’s Kindle have brought eBooks to the mainstream. Even novice technology users have a good general understanding of what an eBook is and how it works. Indeed, reading a book, magazine, or newspaper on an electronic device is common practice.

However, the idea of reading an electronic textbook—or eText—is still, for many faculty and students, a new technology frontier. (For assistive technology users, it can be especially challenging.) This frontier becomes even more unfamiliar and intimidating when they are confronted with not only reading an eText but also interacting with it. Posting and highlight



comments for others to see, and asking questions “within the text,” are not necessarily familiar tasks.

For many faculty and students, the print textbook is foundational to their very understanding of the structure of higher education. In this context, it is important to note that activities associated with the textbook give it an almost totemic quality to the higher education experience. If “going to the bookstore” is no longer a required activity for students, and phrases like “open your textbooks to page...” are no longer uttered in the classroom, the hesitation around eTexts is better understood.

As such, it can be easy for those involved in the rollout of an eText program, or others who are proponents of eTexts, to forget that their enthusiasm for eTexts and their benefits to teaching and learning are not widely shared. It is easy to forget that the idea of an eText truly is radically new and, again, intimidating. When talking with faculty and students about eTexts, a good strategy is to avoid assuming they either understand or are even interested in the concept of eTexts.

### **Stemming a Tidal Wave of Communication: Ensuring eText News Is Received and Understood**

As with any new program or initiative, and especially one that seeks to change the traditional pedagogical landscape, it is essential that information about the program be easy to find, and as up-to-date as possible.

For example, the potential cost savings of eTexts is certainly an

important message to communicate to both faculty and students. Yet conveying this message and other advantages of eTexts—including the pedagogical benefits, the participating publishers, or even that a university-wide initiative exists—can be challenging.

Any given faculty member or student is, on a daily basis, exposed to an *enormous* number of university communications. As such, important news and announcements about the institution's eText program can be easily overlooked. While having a dedicated eText website is useful for consolidating all relevant information, directing faculty and students to the site can be challenging.

One strategy for combating this information overload with faculty is via more direct, "local" contact—for example, distribution of messages to faculty through their dean or department chair, or via presentations at faculty council meetings. Faculty will often listen to other faculty before they turn to a central news source or IT support group. Even limited attendance at faculty meetings where information about eTexts is presented leads to good information dissemination, as faculty will share their interest and questions about eText with their colleagues.

We have also found that webinars targeted to a faculty audience, most often sponsored through campus centers for teaching and learning and focusing on just one aspect of eTexts (for example, cost savings to students or features of the eText reader application), are often well-received and well-attended. We

make a practice of recording these webinars for later viewing and have found this to be an effective communication strategy.

### **Link to the eText Catalog/Ordering Process Should be Conspicuous to Faculty**

When launching an eText initiative, the institution will likely build on and integrate with existing production applications such as billing and class scheduling. In doing so, it can be easy to “bury” key access points and unintentionally hide an otherwise accessible direct link to the eText catalog, by requiring faculty to first navigate through other internal systems.

Placing a conspicuously titled “Faculty Ordering” button on the initiative website has been effective at IU. After an instructor clicks on the button, the resulting process works as follows:

1. Faculty are immediately asked to authenticate via their username/password.
2. They are presented with an option to choose the specific semester for which they want to order an eText.
3. Faculty then see a listing of courses they are scheduled to teach that semester and choose a specific course in which they would like to use an eText.
4. After clicking on a specific course, they are taken directly to the eText catalog to search for and immediately select a title for use in their course.

### ***Toe-may-toe, Ta-ma-toe: Perceived Similarities are Often Significant Differences***

As noted earlier, an eText remains a very new paradigm for faculty in the context of how they think about presenting information to students. However, beyond the pedagogical implications of utilizing an eText, faculty often confuse the underlying eText technology infrastructure—that is, the difference between an eText, the platform utilized to deliver the eText, and the learning management system.

Faculty and students often perceive the e-reader platform as the eText itself, when in reality the platform is just the mechanism for accessing and reading the eText. The similarity between the names is confusing. Another important distinction to address with faculty is the difference between placing an order through the institution's eText initiative and placing an order directly through a publisher's website.

One way of addressing this challenge is to channel publisher communication through an internal university resource rather than letting publishers directly solicit faculty. Coordinating publisher communications through an internal resource also helps prevent publishers from inadvertently offering options that are outside the scope of their eText agreement with the institution.

One exception to this communication strategy is when faculty have a question concerning the availability of a specific text as

an eText. In this case, it is sometimes easier for faculty to inquire directly with the publisher, who can then advise on availability and when the desired text can be added to the institution's eText catalog.

However, providing faculty a more controlled mechanism of communicating with publishers—and still keeping that communication within the context of the larger eText inquiry/order process—is important. A process to facilitate this communication might work as follows:

1. When no results are returned from a search of the institution's eText catalog, a publisher-specific contact is listed.
2. When this contact is clicked, the system automatically generates an email template asking faculty to provide information specific to the text in question — ISBN, title, author, etc.
3. This link might also be configured such that both the publisher and eText initiative administrators are copied on the message.

Hence publisher communication is managed in a way that does not lead to confusion.

## **The Importance of Dedicated Staff**

For even a modest eText implementation, dedicated staff is a critical component of a successful program. At IU, the key position is that of the eText business analyst/operations manager. This position serves as a central point of contact and liaison for all project stakeholders, including the central IT organization, faculty, students, publishers, registrars and bursars on all eight IU campuses. The following table provides examples of the primary job duties and responsibilities of the position.

% Time Allocated	Duty/responsibility
30%	Serve as principal business analyst/operations manager who coordinates major operational functions of the eText program, including tracking of relevant financial data (e.g., generation and payment of purchase orders, account management); serve as central point of contact for publishers and the university, and/or as point of contact between university and third-party consortium working directly with publishers (e.g., the Unizin consortium); provide oversight of eText ordering workflow (i.e., process by which faculty place eText orders for coming term)
25%	Provide leadership for and act as principal lead consultant and “eText evangelist” to campus teaching centers and other groups by developing and leading workshops, webinars, and other instructional curricula on best-practice use of eTexts
15%	Manage, monitor and sequence response to communication from central IT group, vendors, students and other individuals and groups both internal and external to the university
15%	Gather, analyze and report to central IT organization (and/or unit charged with management of eText program) on eText utilization trends, adoption by faculty, and subsequent analysis of said trends
10%	Mediate and resolve associated issues between stakeholders/project collaborators
5%	Attend and present on the eText program at teaching and learning conferences, campus symposia, school/departmental meetings and faculty committees

Job duties and responsibilities of IU eText business analyst/  
operations manager

Other issues to consider when creating an eText business analyst/operations manager position:

- While they are probably not the only person charged with supporting the eTexts initiative, this person will likely become the face of the initiative.
- Many faculty will be more open to meeting with this person when they realize they are not an employee of a specific publisher, but rather the university. We have found that faculty are more comfortable in adopting an eText when they realize this person is ultimately advocating for their interests and the interests of their students rather than a publisher.
- As the initiative grows, a significant percentage of this person's time will be devoted to communication and ensuring that faculty and students are aware of the initiative.
- As with any administrative role, this position will benefit from an incumbent who is familiar with the characteristics and "unique ways" of the specific institution—in other words, from someone who can practice necessary diplomacy in their communications and interactions with faculty, students, publishers, other stakeholders.
- Beyond just talking about cost savings and the operational aspects of using eTexts, this person should be able to address pedagogical issues surrounding eTexts. This gives them credibility when working with faculty.



- The incumbent should be an “eTexts evangelist” who is able to recognize opportunities for growing the initiative.

Regardless of the size and scope of an initial eText implementation, it will likely be perceived as a significant change for both faculty and students. Reading a hard copy text is an activity that’s ingrained into the larger college experience; regardless of the benefits of moving away from it (and there are many benefits), this process change must be carefully managed. Outreach to faculty and students through a variety of methods (not just email/electronic communication) is essential, to help them in first understanding the benefits of eTexts and then in getting dedicated support as they begin teaching and learning with an eText. If this process change is effectively managed, it will form a strong foundation for a successful eText program.

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[1] Available at: <http://iu.box.com/unizinengage>

## 8.

# eText Operations: The IU Experience

*John Gosney, Director of Faculty Engagement and Outreach,  
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This section outlines the day-to-day nitty-gritty of IU's eText program. A large part of the success of the IU program depended upon the hard-won experience that enabled the development of the process described below.

## Preparing for an “eText Order Window”

There should be established dates, an “ordering window,” for when faculty and administrators—and often “course coordinators”, discussed in more detail later in this chapter—can place eText orders for the forthcoming term. Depending on the institution’s academic calendar, there will likely be two ordering windows: one that opens in early spring for the upcoming summer and fall terms; another that opens in early fall for the upcoming winter and spring terms.

To ensure a successful opening of an order window:

- *Reach out to publishers for updated metadata to update the eText Catalog.* Accurate metadata that reflects all of a publisher’s catalog offerings is essential.
  - Depending on the type of data file used by the publisher, some analysis may be required; search fields used with the institution’s online catalog/ordering tool (for example ISBN, author last name, subject) must match corresponding fields in the metadata file.
  - Moreover, the type of data file itself (e.g., ONYX) may not be compatible with either the institution’s catalog or specific publisher data feeds, so a process for

exporting the data file to a common format may also be required. Even though ONXY is standard, some publishers use different facets of ONYX in different ways; for example, the eISBN in one publisher file might not be the same as that for another publisher.

- When beginning work with a publisher, first ask for a sample file and analyze that file to confirm it contains all necessary information. Ultimately, the more this entire metadata/file transfer process can be automated, the less likely the process is to introduce errors and the more likely it will be efficient.
- *Define both “soft” and “hard” closing dates for order window.* There should be clearly defined opening and closing dates for eText ordering, that is specific ordering windows for each semester. Ultimately, these dates will depend on when the final, official schedule of classes for the upcoming term is posted and when students are first able to register for classes. Ideally, the order window should open several weeks in advance of when students can first register, so faculty have time to browse the catalog of available titles. This also ensures that students know, at the time of registration, whether a course will use an eText. This is critical because they will be charged a course fee. A side benefit of meeting the “Soft”

closing date is disability services offices and alternate media staff now have access to the textbook information as soon as one of their students registers for a course that adopted an IU eText.

- “Soft” closing date: this is the day before students are first able to register for courses. In other words, this would be the last opportunity to add an eText to a course before the course is available for student registration. Additional issues to keep in mind when considering the “soft” closing date:
  - Depending on a specific institution’s policy, any request to add an eText to a course after this “soft” closing date might be denied—but, if there is still adequate time before “hard” closing date (see below), an eText might be added.
  - However, since students may have already registered for the course, it should be the responsibility of the faculty member or other departmental staff to notify students who have already registered that the course will now utilize an eText.

- “Hard” closing date: this is the last day an institution can add an eText to a course for the upcoming term, allowing sufficient time to load the eText so it is available to students on the first day of class. There will likely be situations in which a request to add an eText will be granted after the hard closing date:
- A department might add an additional section of a course to meet unexpected late enrollment demands.
- The first time going through an ordering window with a new publisher can sometimes lead to unintentional delays as all parties become familiar with the process.

Regardless of the situation, facilitating these last-minute order requests can be a balancing act between trying to meet everyone’s requests and facing the reality that some dates, for example first day of classes, cannot be changed. To that end, there will likely be situations where late requests cannot be granted. However, rather than simply saying “No,” a better response might be “Not this time, but let’s work together to understand your needs so we don’t have problems next semester.”

- *Communicate with faculty*: broad communication about ordering window opening/closing dates is essential. However, the following additional communications are also suggested. Much of this

information could be placed within a single web page, so general communication about ordering windows could link to this page:

- General description of institution's eText initiative
- Benefits of teaching with eTexts
- Accessibility of the IU eText platform and eText accommodation procedures
- General eTexts "best practices," and how faculty can most effectively utilize them within their courses
- Listing of all participating publishers
- Understanding difference between a traditional eText and other "digital learning tools" like adaptive learning tools, online homework, and problem sets
- Listing of eTexts "Course Coordinators"
- Ordering instructions
- How to make requests for late orders
- Tips for preparing an eText once it is loaded into the learning management system course site
- Integrating a "digital learning tool" within the learning management system course site
- General "troubleshooting" tips

## **The Importance of the “Course Coordinator” Role for Placing eText Orders**

The “Course Coordinator” (CC) role can be extraordinarily helpful in facilitating the eTexts ordering process. The CC might be department or school administrative staff, or a faculty member who is responsible for coordinating a course with multiple sections. In short, the CC is the individual who has, historically, coordinated textbook orders for the coming term, and perhaps served as a “single point of order contact” for a school or department. They are the person who would traditionally place textbook orders received from faculty.

Asking this individual to be the eTexts CC is important, as they are already familiar with the textbook ordering process, including how to “corral” orders. If the department or school has a large number of adjunct faculty, the CC can also reach out to this group of faculty who are often not on campus and therefore difficult to reach. In addition, some departments and schools have rules for tracking materials that must be used for a specific course, so the CC can coordinate these orders. Having a single point of contact who is familiar with the unique characteristics of the department or school can be very helpful for answering last-minute questions and communicating news and other updates about the institution’s eText initiative.



## **Making eTexts/DLT's Available within the Learning Management System (LMS) Course Site**

As the beginning of the semester approaches, it is important to ensure the ordered eText or digital learning tool (DLT) is available within the LMS course site. While the following process will vary depending on each institution, the steps described below should generally apply to any number of eTexts initiatives:

- Once the soft order window closes, publishers will be sent an extract of what has been ordered, as well as subsequent weekly extracts for orders placed afterward.
- The publishers will then begin preparing the requested materials. Some publishers may wait and prepare everything at once. Others may provide materials as requests are received. The publisher can notify the eTexts business analyst/operations manager to let them know when materials are ready, and the eTexts business analysis/operations manager can then notify the respective faculty.
- A target of 30 days before the start of term should be set as the time as when all eTexts/DLTs should be available to faculty within their LMS course site. The publishers will address whatever special configurations are necessary for DLTs. Once these configurations are complete, the publisher can contact the faculty directly.
- Any type of customized process—for example where

a course structure for a DLT is copied from one semester to another—should be closely monitored by both the publisher and the eTexts business analyst/operations manager to ensure materials are properly configured for the current semester.

### **Process for Students Who Wish to “Opt Out” of Using an eText**

A key underlying philosophy of any eText initiative should be saving students money, but student success is of equal importance. Therefore, an institution’s “opt-out” policy should reflect this student success component, by encouraging students, before they opt-out, to think about what they might be missing. For example, see IU’s opt-out policy at: <https://kb.iu.edu/d/alex> and <https://etexts.iu.edu/about/policies.html>

The following is a suggested list of points to share with students regarding the potential impact/consequences of opting out of using an eText:

- You will lose access to all the features and benefits of the eTexts initiative.
- You will lose access to additional items your instructor might add to the eText, such as links to other content; additional supplemental resources; and highlights, annotations, and study tips to guide your engagement and learning in the course.
- You will lose the opportunity to engage, interact, and collaborate with your classmates and instructor within

the eText itself.

- When faculty choose an eText for their course, they are assured all students will have access to the same edition of the text on or before the first day of class. By opting out, you risk falling behind in the course if you have not acquired alternate versions of the same materials prior to the first day of the class.
- The eText reader software allows your instructor to track your engagement — any highlights, annotations, and notes you’ve made—within the eText. Many faculty refer to these engagement logs as a measure of participation or learning that helps identify students who may be struggling in the course. You could thus limit your instructor’s ability to provide you with this additional assistance.
- You would be responsible for legally obtaining alternate versions of all required course materials. Because eTexts and all instructor and classmate interaction that occurs within them are specific to your campus, other “eTexts” you might obtain elsewhere will not include the interactions and/or additional learning materials placed within the IU eText by your instructor.
- In classes using multiple eText titles, you cannot opt out of a specific title. Instead, you opt out of every title in the class.
- Faculty are not responsible for providing you with alternative materials or waiving course requirements.

Be sure you understand participation requirements for the course.

- Your opt-out request is not reversible once it is submitted.

Other things to consider when developing an opt-out policy:

- Federal regulations on opting-out (i.e., that students have the choice to opt out of the eText purchase) only apply to those students receiving federal aid. However, given that such a large percentage of students receive some type of federal student loan, developing a more comprehensive opt-out policy may be necessary, depending on state-specific regulations.
- An opt-out policy for students can also help faculty better understand the implications to the student when they choose to opt out.
- Given the potential complexities of opt-out requests—in our experience, no two requests are likely to be the same—the process for students to opt out should not be completely automated. Instead, each request to opt out should be individually reviewed to consider possible exceptions—and to address students who appeal a decision not to allow them to opt out, if for example they have already accessed an eText but want to opt out of paying for it.

## Billing and Payment to Publishers

Depending on the specific institution, much of the billing and payment to publishers will likely be an automated process. However, as a general process:

- Once the refund deadline has passed for the active term (that is, once it is no longer possible for students to be refunded any amount for enrolling in a course or utilizing materials billed to their bursar account), an enrollment report is sent to each publisher, so they know the number of students utilizing each of their specific ordered titles.
- Next, requisitions are created for each publisher.

Note: depending on the number of students utilizing eTexts, these requisitions can easily exceed a million dollars. Depending on the policies of the specific institution, requisitions at this level may require multiple approvals before a purchase order (PO) is generated.

- Once requisitions are approved, the institution's purchasing department generates a PO, which in turn is sent to each publisher.
- Finally, publishers generate an invoice for that PO, which the institution utilizes to pay each publisher.

While there are several steps to successfully operationalizing an eText program, it's important this process not be perceived

as complex by faculty, students, and course coordinators. How can you ensure the process is perceived as smooth and straightforward at your institution? As with everything that contributes to a successful eText program, clear and timely communication of related process dates is essential (e.g., opening/closing dates of “eText order windows,” last date on which a student can opt-out of a course eText requirement, etc). Moreover, associated components of the process—from the availability of the eText catalog (i.e., the “eText order window”) to the availability of eTexts and digital learning tools within the learning management system—must be as accessible, clear, and user friendly as possible. Ultimately, dedicated support staff who are knowledgeable about the back-office technical and business operation elements of the process are the keystone of a successful, ongoing eText program.

## 9.

# The Benefits of eTexts for Students and Instructors

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Two *EDUCAUSE Review* articles<sup>[1]</sup> reported on research conducted on the use of eTexts. The first article, published in 2015, focused on the benefits to instructors and was based on research done during the eText pilot. This study used analytics from the eText system and a follow-up series of interviews with a small number of faculty eText adopters. The second, published in 2017, focused on the benefits to students and analyzed three

years of student use of eTexts from 2013 to 2015. The sections that follow draw extensively from these two studies.

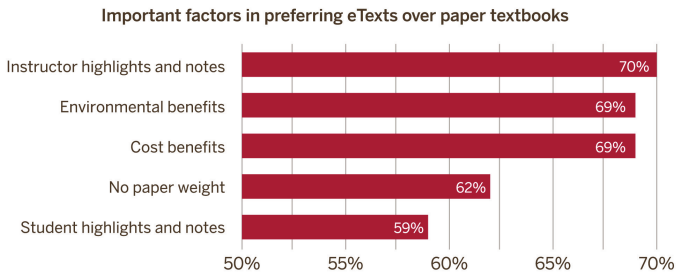
### **Study of Instructor Engagement with eTexts**

During the pilot phase of IU's eText initiative, data was collected from courses in which the instructor opted to use an eText. From spring 2010 until fall 2011, actual eText usage by approximately 2,200 students in 28 courses was examined through review of e-reading platform logs and a survey of self-reported reading behavior, perceived learning, and future preferences. The final sample included 1,081 students from 18 sections of 11 different courses, for a response rate of 49 percent. Courses in the pilot study ranged from business to history, language, telecommunications, psychology, and astronomy.

According to students, only half of the instructors actively used eTexts in their courses. An instructor's active use of eTexts in a course affected student experiences with eTexts. All of these comparisons were statistically significant according to Pearson's chi-square test for independence. That is, student experiences of eTexts were more positive if they felt an instructor actively used eTexts in the class and shared annotations with students. This finding was also supported by the fact that 70 percent of the surveyed students chose instructor highlights and notes as an important factor in preferring eTexts over paper textbooks (see the figure below). When instructors are not actively using the eText, the findings aligned with existing research that shows students read more with paper textbooks and they underutilize



available features of eTexts.[2] However, instructors are key stakeholders in formal education regardless of the textbook's medium. As the study suggested, they are also instrumental in guiding student behaviors and attitudes regarding eText use to enhance learning benefits.



Important factors in preferring eTexts over paper textbooks

Although other studies also highlight the critical role of instructor eText adoption and use of enhanced features (i.e., shared highlights and annotations) in student eText experiences, no research has examined instructor motives for adopting eTexts or how instructors use eTexts in their courses.[3] At IU, we had a unique opportunity to address this gap by interviewing instructors who actively used an eText in their course for at least two semesters.

Electronic textbooks can be affordable alternatives to paper textbooks. However, savings from eTexts do not realize their intended value, actual learning, if the eTexts are not actively

used. With features such as search, shared highlights and notes, digital accessibility from multiple devices, and reading statistics, eTexts have the potential to enhance learning experiences when both instructors and students engage with them.

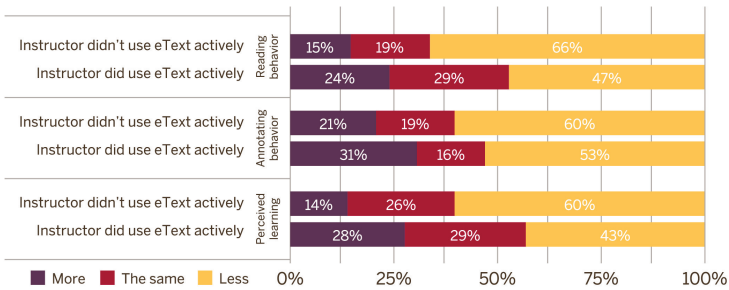
Student data from the pilot phase of the program demonstrated that an instructor's active use of the eText for a course is associated with a higher percentage of students reading and taking notes in their eTexts. Not only do students find instructors' highlights and notes useful for learning, but they also consider these features as important as the lower cost of the eText vs. a print textbook when deciding to use eTexts. Therefore, more active instructor engagement with the eText may encourage higher adoption of eTexts by students.

Given that instructors appear to play a key role in maximizing the benefits of eTexts, five instructors from Indiana University were interviewed in order to shed light on their motivations and how they use eTexts in their teaching. Besides the lower cost to students, our instructors offered four other reasons for adopting eTexts:

1. Guaranteed access to eTexts by all students when the semester starts
2. Ability to share highlights and notes with students directly on the eTexts
3. Ability to use eTexts more effectively during class time
4. Ability to view student engagement in readings

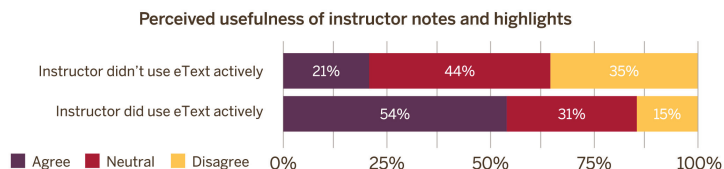
According to these instructors, shared highlights and notes can serve as another channel to communicate with students about the reading materials. These highlights and notes can also aid in-class activities and studying for exams. The instructors in the study did not change their teaching pedagogy when using an eText, but did report higher use of eTexts in the classroom compared to paper textbooks—in particular, thanks to the search function and the fact that every student had access to the text.

Students' reading, annotating behavior, and perceived learning based on instructor eText use



Students' reading, annotating behavior, and perceived learning based on instructor eText use

Simply put, when instructors engage with eTexts, so do their students. The findings from the study suggest that instructors play an important role in eText adoption by modeling active eText use and creating meaningful interaction around the content. Therefore, professional development for faculty around best practices in using eTexts can help instructors and students embrace and make the best use of eTexts for learning.



Perceived usefulness of instructor notes and highlights

To sum up, eTexts can offer higher returns on the cost savings when both instructors and students take advantage of the available features.

### Study on Student Engagement with eTexts

This study looked at usage data from the Engage e-reading platform for undergraduate courses offered in face-to-face settings in fall and spring semesters only. We also excluded data from the spring and fall semesters for spring 2013 to spring 2016. The study encompassed 865 courses and 2,242 sections with over 68,000 registered students.

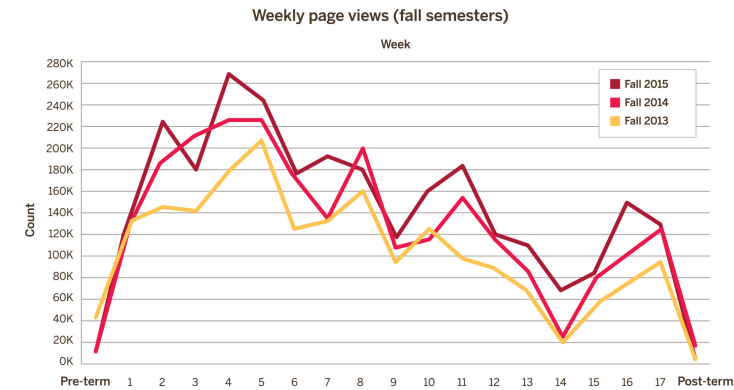
**How much do students read their eTexts?** The answer to this question relies on page views. The Engage database records a page view when a user stays on an eText page for at least 10 seconds. (Note: Data is unavailable if a student with a disability uses an accommodated text; this could mislead an instructor as to their participation and level of effort.) This threshold aims to

differentiate between browsing and reading activity, according to the Engage developers. Viewing a page for at least 10 seconds serves as a proxy indicator for reading.

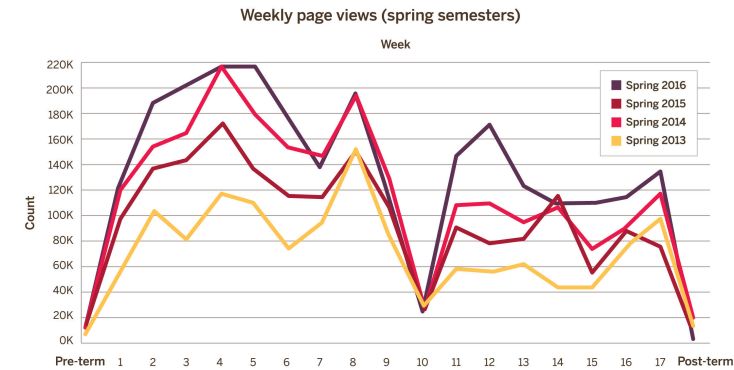
For all semesters combined, over 46,000 students viewed more than 15 million pages of eTexts. This total includes multiple viewings of a particular page for review and studying purposes. Students could access their eTexts before the first day and after the last day of class. Nearly all page views (98.6 percent) occurred during the regular semester. But even though only 0.4 percent of the total page view records occurred before classes started, on average eight percent of the students in any semester opened or explored their eText before the semester. Similarly, page views after the end of the semester constitute only one percent of total page views, with about 10 percent of students each semester re-visiting their textbook after the course finishes.

**Reading pattern per semester.** As evidenced by two figures below summarizing weekly activity for fall and spring semesters, respectively, the general reading activity for students closely followed the term schedule. Substantively more reading occurred within the first four weeks of a term, followed by a small decline before a slight increase. Since the data comes from undergraduate courses, this pattern probably corresponds to assessment activities for courses. Drops in activity corresponding to semester breaks for the fall and spring terms (Thanksgiving and spring break, respectively) also support this pattern. Following these breaks, activity is somewhat reduced and likely follows concluding course assessments like final exams. Lastly, the reading activity corresponds with the use of

interactive markup features, which suggests that most markup occurs during reading as opposed to reviewing.

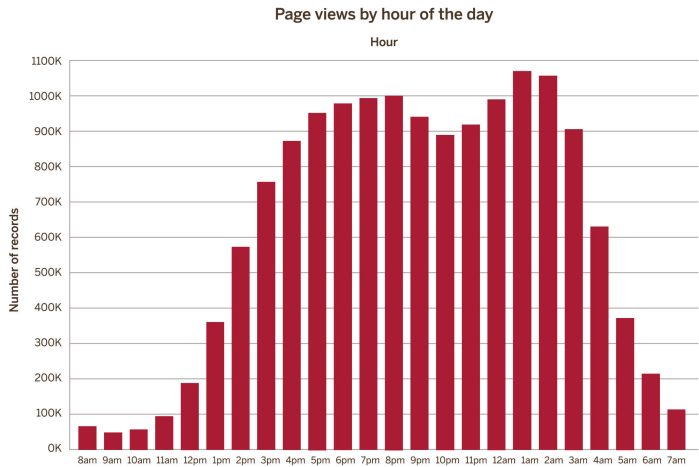


Weekly page views (fall semesters)



Weekly page views (spring semesters)

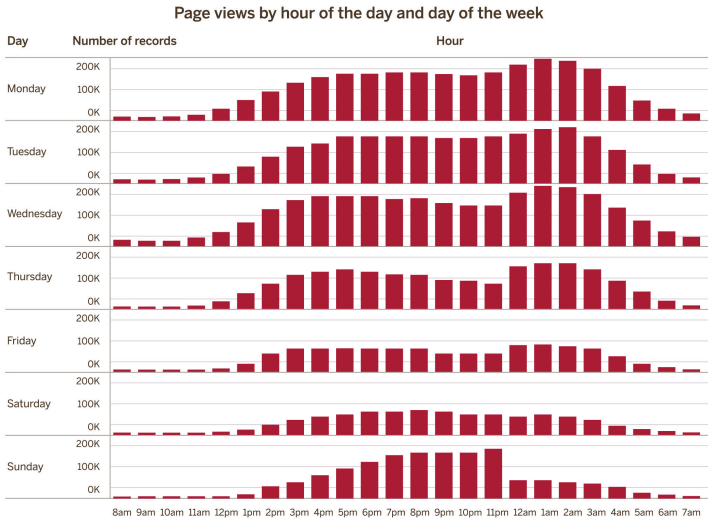
**Time of day.** Using actual time stamps from Engage records, page views across all courses in fall and spring semesters were examined by the hour of day. In a 24-hour time window, students viewed 26 pages on average. Students' reading activity started slowly in the morning (3,404 students with 15 page views per student) and intensified through the afternoon into the evening and night. Although reading slowed down between 9pm and midnight, it picked up after midnight and reached peak levels between 1–2am (30,604 students with 35 page views per student). The number of students studying dropped sharply after 3am until 7am in the morning. Given that most of the eText courses in the sample were taught face-to-face during the day, the pattern in hourly page view activity indicates that students used their eTexts mostly for self-study.



Page views by hour of the day

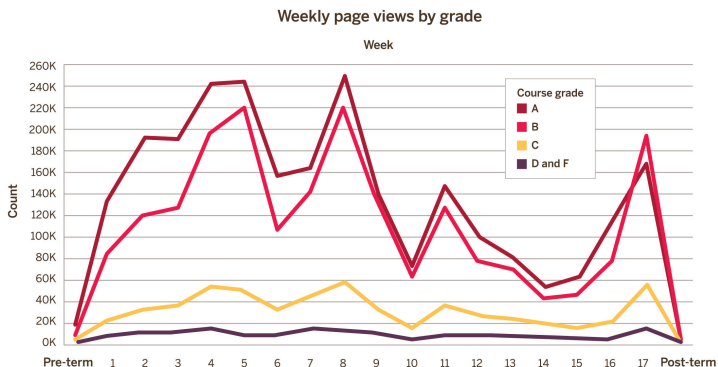
Examining hourly page views by day of the week also elicits interesting study patterns. As the figure below demonstrates, students tend to follow the same study routine Monday through Thursday, when most of their studying from textbooks occurs in the evening and late night. On Friday and Saturday, the volume of page views decreases sharply. On Sunday, students resume studying in the afternoon. Unlike other days when peak study times extend past midnight, the number of students studying after midnight on Sunday more than halves, resulting in a sharp drop in page views.



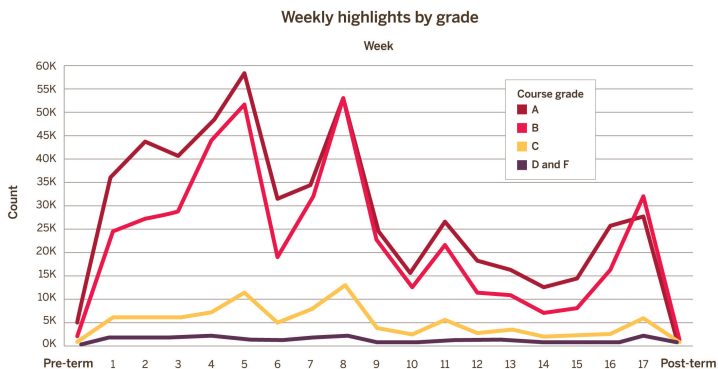


Page views by hour of the day and day of the week

**How does eText use impact grades?** A meaningful answer required a large subset of IU Bloomington student grade data, combined with Engage records. As the figures below indicate, high-achieving students (A and B grades) made the majority of page views and highlights. Average performing students (C grade) had substantively less page view and markup activity across all terms. Finally, students who had an unsuccessful outcome (D and F grades) had little to no activity in either accessing the eText or using interactive markup features. In general, then, these data support the expected pattern of higher engagement with reading materials relating to higher performance within courses.



Weekly page views by grade

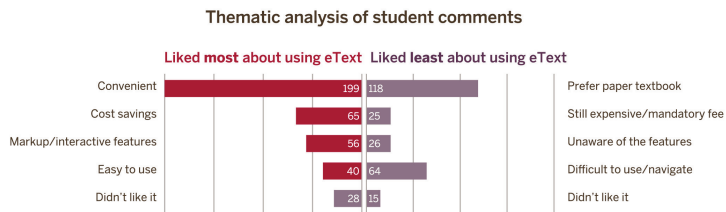


Weekly highlights by grade

This pattern of higher engagement leading to higher

performance (upon further analysis and statistical testing) might provide indicators for inferential and predictive work with e-reader data. When connected to additional data sources (e.g., learning management system and assessment data), e-reader activity data can be used to develop predictive and supportive models for assisting and improving student success within higher education — especially when a course is designed around taking advantage of such data.

In fall 2016, a university-wide Learning Technologies survey was conducted using a random sample of all students, faculty, and staff. The survey's purpose was to assess awareness and use of specific teaching, learning, and collaboration services/technologies. Ten percent of the student sample from three different campus profiles (Bloomington, Indianapolis, and regional campuses) responded. Students who have used an eText were asked to respond to two open-ended questions regarding what they liked most and least about their experiences. A total of 379 students commented on what they liked most; a total of 376 students commented on what they liked least. These comments were coded by two readers with 95 percent inter-rater reliability. Several themes emerged from the positive and negative comments (figure below).



Thematic analysis of student comments

As was the case with the earlier faculty study, the results point to a conclusion that educators and educational researchers have long known: More engagement with and access of course materials leads to more positive outcomes for students. Often unknown, however, are the types of access and resources used by students within specific educational contexts, especially when most of their activity occurs outside of formal educational spaces. eText readers can provide possible insights into both the degree and kinds of engagement employed with course materials. On its own, this information is unlikely to yield effective and efficient analytic models of student engagement. However, when coupled with other data sources corresponding to learning activities and spaces (e.g., LMS activity), the development of predictive systems for course instructors and academic advisors becomes a real possibility.

An additional factor to consider in the adoption and implementation of eText readers is the possibility of positively affecting students' reading practices and instructors' pedagogical practices. The IU eText reader, Engage, offers

instructors and students opportunities to collaboratively interact with the reading materials through the tool platform. However, as this data reveals, instructor use of the tool’s interactive features was minimal in most cases. While the reasons likely vary between instructors and courses, the data indicates the need for additional training on the effective use of the platform.

To address this need, IU is currently creating both a professional development module for instructors and an online orientation module for students about “learning with eTexts.” These modules will be guided by John Dunlosky et al.’s effective learning techniques.[4] Instructor modules are self-paced online modules that will also be used for “teaching with eTexts” workshops at the campus centers for teaching and learning across IU. The online orientation module specifically targets students set to take a course with eText. We hope that by gaining insights into the various features available within Engage, both instructors and students will increase their engagement with eTexts, thereby contributing to better student performance.

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[1] Serdar Abaci, Anastasia Morrone, and Alan Dennis, “Instructor Engagement with E-Texts,” *Educause Review* 50(1), January/February 2015, <https://er.educause.edu/articles/2015/2/instructor-engagement-with-etexts> and Serdar Abaci, Joshua Quick, and Anastasia Morrone, “Student Engagement with e-Texts: What the Data Tell Us,” *Educause Review* October 9, 2017,

<https://er.educause.edu/articles/2017/10/student-engagement-with-etexts-what-the-data-tell-us>

[2] Serdar Abaci, Anastasia Morrone, and Alan Dennis, "Instructor Engagement with E-Texts," *Educause Review* 50(1), January/February 2015, <https://er.educause.edu/articles/2015/2/instructor-engagement-with-etexts>

[3] See: *Internet2 eTextbook Spring 2012 Pilot Final Project Report*. August 1, 2012, <https://www.internet2.edu/media/medialibrary/2013/10/07/eText-Spring-2012-Pilot-Report.pdf> and Susan Grajek, *Understanding What Higher Education Needs from E-Textbooks: An EDUCAUSE/Internet2 Pilot* (Research Report), Louisville, CO: EDUCAUSE Center for Analysis and Research, July 2013, <http://www.educause.edu/ecar>.

[4] John Dunlosky, Katherine A. Rawson, Elizabeth J. Marsh, Mitchell J. Nathan, and Daniel T. Willingham, "Improving Student's Learning with Effective Learning Techniques: Promising Directions from Cognitive and Educational Psychology," *Psychological Science in the Public Interest* 14(1):4–58 January 2013, <http://journals.sagepub.com/doi/10.1177/1529100612453266>

## 10.

# Accessibility of the eText Platform and Accommodating Access

***Brian Richwine, Manager, UITS Adaptive Technology and Accessibility Center at IU Bloomington***

An early concern for IU was how accessible the eText platform would be to IU's students with disabilities. How would the adoption of an IU eText affect a student with disability's access to textbooks, and how accessible are the platform's rich annotation features? IU's IT accessibility staff developed a relationship with Courseload's technology director and development staff. Courseload staff analyzed the accessibility of the eText platform and explored the challenges universities face in providing textbook accommodations. Courseload met with

other universities and created an Accessibility Advisory Board (AAB) to gather input on accessibility requirements. (Note: In 2015, Unizin acquired the Courseload software assets—see [timeline](#).)

## Challenges in Accommodating Textbooks

When the IU eText program started, publishers were only beginning to understand the accommodation of textbooks for individuals with disabilities. Receiving an accessible format (in any form) of a higher education textbook directly from a publisher was unheard of—even receiving a largely inaccessible PDF copy of a textbook from a publisher as an ADA accommodation request frequently took weeks, if the request was even fulfilled (only about 70% of publisher copy requests were being fulfilled).

To counter this reality, IU’s alternate media center provides students with disabilities a “Scan, Read, Achieve” service where student-purchased textbooks are chopped (unbound), run through high-speed duplex scanners, and then converted into an accessible format specifically tailored to meet an individual student’s needs and preferred format. The alternate media formats needed vary widely and include zoned ‘KESI’ files for Kurzweil 3000, reading order corrected PDFs for TextHelp Read&Write Gold, large-print or high contrast versions for students with low-vision, accessible eTexts with described images and math (DAISY, accessible Word documents, EPUB), and braille+ tactile images for students with very low vision or blindness.



Accommodating textbooks by converting them into alternate formats takes considerable time and effort. Before that work can even begin, alternate media staff need access to the textbook. Delays in receiving textbook information from course instructors and in receiving a copy of the textbook either from a publisher or from the student mean potential delays in providing a student access to their textbook.

### **How Courseload/Unizin and IU's eText Program Facilitate Textbook Accommodation**

IU realized early on that the accessibility of the IU eText program depended on two focal points: access to the textbook and access to the eText platform's rich annotation features. The IU eText program addressed both points:

- Access to the textbook
  - Publishers faced a long journey before they would be producing accessible eText materials that meet the needs of students with disabilities.
  - The benefits of using IU eTexts formed an incentive to early adoption and publication of required textbook information. Meeting the program's "soft" ordering window dates means that disability service staff have access to a course's textbook information as soon as a student registers for the course

section. This eliminates delays in gathering required textbook information.

- Publisher contract language includes provisions where IU can either immediately obtain clean PDF copies of a textbook directly from Courseload (Unizin) or the publisher must provide a PDF upon request within two business days.
  - Alternate media staff thus gain sufficient time to perform the conversion of the PDF into the student's required alternate media format. They deliver the alternate formatted textbook to the student, ensuring the original print page navigation is available.
- Access to the platform's annotation features
    - University accommodation staff could not provide equal access to the eText platform's dynamic annotation features. This required the eText platform's interface and annotation features to be natively accessible to assistive technologies so all students have 24/7 access to those benefits.
    - Courseload (Unizin) partnered with universities and the National Center for Accessible Media (NCAM) so the eText platform interface and annotation features are accessible and usable via common

assistive technologies.

- Fitting it all together
  - The “Alongside” accommodation approach
    - The “Alongside” accommodation approach was created to enable a student with disabilities to receive textbooks in their preferred form (Kurzweil 3000, TextHelp Read&Write, accessible EPUB/DAISY/Word, braille, etc.) and to access the platform’s annotation features.
    - By ensuring the alternate formatted textbook maintains accurate page navigation and fidelity to the original eText’s page numbering, the approach makes it possible for a student to use their alternate format version of the textbook and find any page annotations in the eText platform. For example, a screen-reading software user can simply “Alt-Tab” from their accessible eText to the annotations in the eText platform.
  - Support

- Communication is key. The accessibility and accommodation procedures for the IU eText program are discussed in a student's disability services intake interview if they are authorized for textbook accommodation.
- Students are offered training and support in using the IU eText platform via their assistive technologies. As stated earlier, confronting and interacting with an eText platform can be unfamiliar and intimidating for any individual, let alone a student needing to access such a platform using their assistive technologies. To ease the learning curve and increase confidence, IU's assistive technology support staff provide student training.

### **A Move toward Native eText Accessibility—Reducing the Need for Textbook Accommodation**

Today, most of the large textbook publishers have significantly matured their accessibility awareness and have developed processes to produce “born accessible” eTexts. For example,

Pearson, MacMillan, Cengage, and other publishers participate in industry-wide digital publishing standards groups to address the many aspects of producing accessible eTexts. Along with this progress by publishers, many universities are successfully getting instructors to create accessible instructional materials.

With this increased availability of born accessible eText materials comes an increasing expectation of the accessibility of eText platforms. The ability to ingest eTexts, process accessibility features, present the eText accessibly, and provide basic accommodation features (such as built-in text-to-speech) to users of many diverse needs is now required.

IU participates in industry groups, works with publishers, and continues discussion with Unizin so all can work towards a future where eText platforms are natively accessible and provide many common textbook accommodation features. When all publishers and platform providers succeed in implementing this common standard, eText platforms could directly meet the textbook access and accommodation needs of students with learning disabilities, physical disabilities, hearing impairments, and many visual impairments.



## PART IV

# Publisher Perspectives





## 11.

# Partnering with Institutions for Student Success: Pearson Perspective

***Nik Osborne, SVP Strategy & Business Operations, Pearson Education***

***Tim Peyton, VP of Solutions Portfolio Management, Pearson Education***

Pearson and Indiana University (IU) have partnered for nearly five years on IU's eTexts Initiative. During that time, the partnership has provided faculty and students with first day of class access to affordable, high quality Pearson products that help improve teaching and learning—and has saved IU students millions of dollars in the process.

Over the past five years, Pearson has successfully partnered with numerous institutions on similar initiatives and has found several common themes that support overall success. Below is a quick overview of the eText Initiative model—known commonly among publishers as “Inclusive Access”—necessary requirements, plus some features that have driven the success of the model at various institutions.

### **What does an Inclusive Access/eText Initiative require?**

- All students in participating courses are directly charged for course materials by the institution or bookstore/distributor as part of a course materials fee/bursar charge (subject to applicable opt-in/opt-out policies) in exchange for discounted pricing from publishers
- A minimum sell-through threshold (typically 90% average across all participating courses) that ensures all students receive/have access to the required product and that publishers and content creators are compensated for all usage of the required product
- The institution and their chosen bookstore/distributor adhere to a Maximum Resale Price for course materials—to ensure that the students receive the product at a discounted price, instead of at a price that has been marked up via traditional store margins
- The publisher and institution implement a delivery

model that enables day one access to course materials—ideally through LMS integration, though digital access codes are also an option

### **What common themes create successful Inclusive Access/eText Initiatives?**

Pearson has found that the difference between highly successful initiatives that grow rapidly at an institution vs. those that stay in pilot mode for several semesters often depends on a few factors. As in the case with most partnerships, when both sides are aligned and working towards a common set of goals, the partnership is highly likely to succeed. When the efforts are one sided or alignment doesn't exist, partnerships will often fail to meet the goals for which the partnership was formed. Below are some important points that should be considered when establishing an Inclusive Access model/eText Initiative:

1. **Identify the Goals of the Partnership.** This may seem simple, but it's extremely important to have a candid conversation about why the institution/publisher is interested in these types of models. Is the focus on lowering the cost to students? Ensuring all students and faculty have access to high quality materials on the first day of class? Is the institution interested in maintaining a revenue stream? Are there goals around improving student success or ensuring employability? Is there a desire to review and interact with learning data?

2. **Identify the Ecosystem.** One of the biggest hindrances to these models/initiatives is the failure to understand and work within the institution's ecosystem. Has an institutional digital platform been selected (i.e. VitalSource, RedShelf, Engage, etc.)? If so, how will that platform work within the various institutional systems (LMS, SIS, Bursar, etc.)? Is a bookstore involved and what will be its role moving forward?
3. **Walk Through the Process.** Every institution currently has a process for how faculty select course materials and students purchase and consume those course materials. When driving these models/initiatives, Pearson has ensured that all efforts are taken to work within the current process at the institution—however, in some cases adjustments need to be made to ensure the faculty/student experience is not disrupted. For example, how will financial aid be managed? How will digital products be integrated? How will student fees be charged? How will monies/payments be handled? What type of support processes will need to be in place?

**Who is the Institutional Champion?** Pearson has found that the success or failure of these Inclusive Access models/eText Initiatives hinges on one very important piece—the Institutional Champion. Institutions need to have someone who is willing to lead the program and drive its success across the institution.

Undoubtedly, when initiating these models, roadblocks will emerge, issues will arise, problems will occur—and without a champion at the institution who is willing to push past these obstacles, the initiative can stall or even fail. Publishers and partners can help support these models, but it takes someone at the institution to champion the effort and ultimately drive success. Pearson has seen various leaders become the champion—from CIO's/CFO's, to Provosts/Chancellors to Chiefs of Staffs/Department Heads to Bookstore Managers—so there isn't necessarily a requirement around the type of position necessary. However, if the desire is to create a successful and sustainable model moving forward, an Institutional Champion must be identified.

4. **Communicate, Communicate, Communicate.** You simply cannot over communicate when establishing one of these models/initiatives. It's important to consider all forms of communications—meetings, websites, FAQs, blanket messaging, marketing, etc.—as you will have various types of questions, comments, concerns, and perspectives from all types of individuals at the institution (faculty, students, parents, administrators, etc.). Further, strongly consider beginning your communications/gathering feedback long before you initiate the program. Pilots can be helpful as they can create real data that can be used in supportive communications, but you should strongly consider a robust communication effort prior to executing on the model/initiative.

Overall, implementing an Inclusive Access model/eText Initiative is an important piece of an institution's overall approach to course materials, data analytics, and new models to support teaching and learning. There are multiple options and offers that can help institutions meet their individual goals while providing students with access to affordable learning materials, and there are excellent partners that can help an institution along the way.

## 12.

# Evolve your Approach to Access and Affordability: Cengage Perspective

*Kelly Manuelidis, Senior Midwest Account Manager, Cengage Learning*

*Michael Hansen, CEO, Cengage*

### **Part 1: The Inclusive Access Business Model**

There is an educational solution that saves money, ensures greater preparedness, streamlines processes, and delivers results. A model that empowers faculty to teach with an eye toward students' financial limits and equips learners with the resources they need to get all they can out of their courses.

Inclusive Access is a business model that integrates the cost

of course materials, while delivering content directly and seamlessly to a Learning Management System (LMS) so students are ready from day one.

In 2012 Cengage and Indiana University (IU) set a goal to make learning materials more accessible and affordable for students while enhancing instructor access to high-quality materials of choice. Currently, around 15–20% of courses have adopted the Inclusive Access model, bringing overall usage from 9 classes in 2011 to 1,176 classes in 2016 — with more courses adopting every semester. The Inclusive Access partnership between IU and Cengage is working wonders, and it saved students more than \$1.3M in 2016-2017 alone.

Note that inclusive access is not a one-size-fits-all endeavor. Instead, Cengage considers an institution's appetite for digital adoption—then builds out a solution that's uniquely suited for them.

### **Identifying your reasons for implementing an Inclusive Access partnership is step one.**

What are the benefits?

- Students succeed with accessible and affordable materials on day one.
- Instructors are more effective with prepared students and integrated digital resources.
- Institutions thrive with improved student performance, retention, and graduation rates.



- College Stores get high sell-through, satisfied customers, and streamlined processes.

You should also consider:

- State regulations around course fees
- How you'll get buy-in from your institution's leadership
- Who on your campus can oversee the implementation and faculty training
- Communication strategy for rolling out the model to students and instructors
- Variety of materials requiring access
- Technology capabilities at your institution
- Process for overcoming obstacles
- Methods for evaluating the results post-implementation

Students should have access to high-value learning experiences, regardless of their financial situation. By lowering the total cost of materials and incorporating the costs into tuition, Inclusive Access dismantles this obstacle for students, decreasing their upfront financial burden.

In the Inclusive Access formula, affordability informs access and access informs achievement. The streamlined delivery model enables students to have all course materials in hand from

day one, so students don't just show up to class—they show up ready.

## **Part 2: Affordability is Only Half of What We Need**

### ***A leadership perspective from Cengage CEO Michael Hansen***

**Affordability matters.** We must find a way to lower the cost of course materials to remove any barriers from students getting a great educational experience.

But affordable products are not enough. If we overlook whether educational materials—including content, digital platforms and personalized learning technology—can help students achieve their goal, we're missing the point.

Affordability plus results equals value, and that needs to be our focus as an industry.

Students and instructors should never be forced to choose between the results they want and the price they can afford. Providing good value to students means delivering materials that help students achieve their goals while staying within their budget.

At Cengage, this sense of value shapes our approach to designing, developing and distributing our products. Through technology, we're producing materials that are more effective

and efficient, allowing us to lower costs while boosting outcomes. Most importantly, we know that the right learning tools can improve course completion. Taking a course only one time is definitely the best way to keep college affordable!

Shifting to digital has also given us the ability to explore new business models, like Inclusive Access, that allow us to work directly with institutions to make sure all students have affordable access to high-quality materials. And by providing more purchase and rental options, we're meeting students where they are and giving them the largest number of choices.

If we are to instill confidence in the value of higher education for generations to come, we must find a way to lower costs while improving results. The future of our students depends on it.

13.

## Delivering Affordability and Outcomes: McGraw-Hill Perspective

*William (Bill) Okun, President of Higher Education, McGraw-Hill Education*

*Alfred (Al) Essa, Vice President of Analytics and R&D, McGraw-Hill Education*

### Partnership

At McGraw-Hill, we're focused on student success and unlocking the potential of every learner. To do that, we believe you need to provide great products and service that drive outcomes at an affordable price.

Price is only one part of that equation, though. To create real value, you need to balance offering lower-cost options with preserving academic freedom and delivering meaningful outcomes.

That's why we've built our whole strategy around "Affordability & Outcomes," and why we're partnering with respected institutions like Indiana University and organizations like Unizin to deliver on our promise of helping students succeed.

We believe that successful partnerships must be grounded in aligned purpose, mutual respect, open and honest dialogue, and a deep understanding of what constitutes a "win-win-win-win" relationship—for students, educators, the institution, and the publisher. These factors define our relationship with IU and Unizin. We're confident that, together, we'll produce creative solutions, evolve these solutions as we learn, and deliver real impact to all of our stakeholders. We couldn't be more excited about working together to deliver our best on behalf of students and educators.

## **Research**

Indiana University and Unizin lead the higher education community in using data and advanced analytics to improve learner outcomes. As we continue to innovate and drive the utilization of digital learning solutions, we're excited about the opportunity to partner with IU and Unizin in using new analytic techniques to unlock the full power of personalized instruction.

Adaptive learning systems, for example, can tailor instruction to the needs of individual students “just-in-time,” meaning when and how they need it. Advanced analytics can also provide deep insights into learner behaviors and performance, so faculty can target feedback and instruction at the individual level. IU and Unizin are building out many aspects of the critical infrastructure required for advanced analytics.

We look forward to supporting these projects and collaborating on learning analytics research, so every student—no matter who they are or how they learn—has the opportunity to succeed.

## 14.

# Helping Faculty Publish Internal eTexts: IU Press Perspective

*Gary Dunham, Director of IU Press and Digital Publishing*

In recent years, Indiana University Press has participated in the IU eTexts program as an in-house partner to help faculty author and publish their works for students. The model has worked very well by enabling a complete lifecycle for content that is particularly tuned to a course. At IU, the Press is part of the Herman B Wells Library and offers a full range of editing and production services for physical and digital books.

The Press develops the eTexts to work on the Unizin Engage platform and integrate directly with Canvas. In some cases, school deans have ventured the capital to fund faculty or lectures to write books that are used for IU courses. Through the eText model, the costs to create those works can be recovered over time while also saving students money over other options.

The Press fully supports offering affordable course materials for students, which is a main goal of the eTexts program. One way to do so is to encourage and professionalize rapid digital textbook development and dissemination on campus.

Pressbooks has become the primary vehicle for Indiana University Press's emerging campus-based textbook program. Four textbooks have been developed through Pressbooks; each involves a close collaboration with the Kelley School of Business and University Information Technology Services. The Press supplies project management, developmental editing as needed, copyediting, composition and design, and targeted marketing as the textbooks are developed and published.

The Press's experience with the textbook program so far reveals two factors that are proving crucial for its long-term success:

- Detailed coordination of content development and dissemination schedules between press staff and faculty authors well in advance, as much as two to three years going forward. This is necessary in order to fully anticipate and plan for subsequent editions of existing material as well as new textbooks for courses to be unveiled in future semesters.
- Constant testing of the workflow connecting the faculty author and UITs in order to ensure that it is efficient, refined, and technologically up to date enough to deliver seamlessly and reliably a quality product in an acceptable timeframe.

By working closely to conceptualize, build, and distribute digital



course materials through Unizin Engage, faculty and the university's own press together realize several key goals of the eTexts program: Costs are tightly controlled, no third parties are involved, revenue is reinvested directly back into the university, and publication is faster.



PART V

**Additional University  
Perspectives and  
Experience**



## 15.

# Introduction

As the cost of higher education continues to rise, colleges and universities across the country are exploring a variety of approaches to address this challenge. From participation in consortiums like Unizin (of which Indiana University and the four universities featured here are members) to campus-specific initiatives (e.g., eText programs with publisher partners, faculty-produced open educational textbooks), these efforts are resulting in lower-cost textbook options for students. Importantly, another outcome of seeking to lower the cost of course materials is increased faculty engagement, fueled by the availability grants to support development of open textbooks and for course design and development. Addressing the challenge of rising costs to students has also led to new and innovative collaborations with campus libraries.

This section describes the efforts of four other institutions, and how they are implementing the aforementioned and other approaches to reducing the cost of higher education.

## 16.

# University of Iowa: Affordable Content Activities

***Annette Beck, Director, Enterprise Instructional Technology, Office of Teaching, Learning and Technology, University of Iowa***

As tuition and higher education costs rise for students across the country, more and more institutions are focusing on ways to decrease the overall cost through more affordable content options to students. High textbook prices are an additional, many times unnecessary, burden on students and their families.

The good news is that new options and content models, such as digital texts and media-rich online content, are available for free through open educational resources (OER) or at greatly reduced publisher pricing. These opportunities decrease the overall cost of education while also providing new affordances to learning.

Following is a non-exhaustive list of University of Iowa committees and initiatives that are focusing on this issue or may be impacting this problem in peripheral but positive ways. Staff in the Office of Teaching, Learning & Technology (OTLT) are partnering with faculty, the Iowa Hawk Shop University Book Store, Administrative Information Systems (application developers), University of Iowa Libraries, and Unizin partners to identify ways in which we can expand these opportunities to our students.

- **Unizin**—led by the Office of Teaching, Learning & Technology
  - Implementing the Unizin Engage e-text platform. This platform will provide access to greatly-reduced textbook prices and OER, while also offering faculty insights into how students use these digital materials.
  - Pressbooks is a content authoring tool. OTLT supports faculty in creating their own content to support course learning objectives.
- **Digital Direct Access (DDA) collaboration**—led by the Iowa Hawk Shop Book Store and the Office of Teaching, Learning & Technology
  - DDA is becoming a popular new model across the country for ensuring that all students receive course content at greatly

reduced cost. The key is that the content is immediately available to registered students within their learning management system course site.

- This model provides students quicker access to learning materials, which translates into future success.
- These two offices are jointly developing and supporting the students' DDA (textbooks and other content) with charges sent to students' billing accounts, and the Iowa Hawk Shop Book Store is doing this **without additional price markups to students.**

## • UI Libraries

- A Scholarly Communication Librarian has recently been hired, and is focusing on new ways for the UI Libraries to increase student access to OER and Library-licensed content.
- The UI Libraries are leveraging and participating as members of the Open Textbook Network (OTN)—*The Open Textbook Network (OTN) promotes access, affordability, and student success through the use of open textbooks.*[\[1\]](#)
- A new Textbook Purchase and



Affordability Pilot Program has been developed in partnership with UI Student Government (UISG). Through this new initiative, the UI Libraries will purchase textbooks for course reserves and accept textbook donations to increase access for students, particularly in large courses.

- The Scholarly Communications Librarian is conducting environmental scans to identify target courses for potential OER replacement.
  - Staff in the UI Libraries regularly deliver OER workshops and provide other educational support efforts, such as their Liaison Library program.
- **Council of Deans' OER Ad Hoc Committee**—led by University Libraries in collaboration with OTLT staff. The final report from this committee will be available by the end of the spring 2018 semester. This short-term committee was charged to:
    - Perform an environmental scan across colleges to determine how textbooks decisions are made and measure the comfort level with OER.
    - Define a future OER strategy for the UI including the roles of the colleges, the libraries, the Office of Teaching Learning

and Technology, the Iowa Hawk Shop Book Store, and student government.

- Develop a common language around OER tools and services.
  - identify potential pilot applications including incentives for creating OER (i.e. expand upon the Open Textbook Initiative).
  - Explore the Unizin role and partnerships.
- **Provost's Office Textbook Task Force**—another short term committee, sponsored by the Associate Provost for Undergraduate Education, charged to:
    - Review UI compliance with textbook/course material requirements of the Higher Education Opportunity Act (HEOA).
    - Identify challenges and opportunities to improving UI compliance with the HEOA and earlier faculty adoption.
    - Explore opportunities to reduce student cost of textbooks and course materials.
  - **Learning Design Collaboratory**—led by OTLT staff, along with partners in University College, the UI Libraries, and local college instructional support units, this new program is a centrally-funded, strategic initiative to support course redesign that leverages evidence-based pedagogies and best practices.

- The goals of the Collaboratory are to:
  - Improve student success
  - Improve faculty experience
  - Improve the quality of course design and delivery
  - Lower the cost of course delivery

The fourth goal of the Collaboratory specifically provides the opportunity to introduce OER and DDA content, which will provide significant savings to students.

The Collaboratory supports three faculty activities with different levels of funding to faculty participants:

- **Community of Practice (CoP)**—a cohort of faculty who meet on a regular basis to explore new pedagogies and strategies for use when they work with the Design Teams
- **Course Design Teams**—led by a Learning Designer, these teams of staff come from areas and expertise within OTLT and across the campus, and are assigned to faculty in order to meet the needs of their specific course redesign efforts
- **Assessment**—the OTLT Research & Assessment team works with the faculty prior to redesign to review data from past courses and inform decisions about redesign. Assessment staff work with the

faculty and the Design Teams to develop an assessment plan to measure impact of the redesign efforts.

Opening up new content options to our students by supporting faculty adoption of new digital content and engagement is requiring campus-wide effort and a growing appreciation for the opportunities afforded. New initiatives and supports will certainly evolve into the future as we assess and research outcomes from the current work at Iowa and elsewhere.

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[1] <http://research.cehd.umn.edu/otn/>

## 17.

# Support for Faculty Produced eTexts at the University of Minnesota Libraries: Lessons Learned

*Kristi Jensen, Program Development Lead, eLearning Support  
Initiative, University of Minnesota Libraries*

## **Introduction to Course Content Support from the University of Minnesota Libraries**

The University of Minnesota Libraries created the eLearning Support Initiative in the fall of 2012 in response to Executive Vice President and Provost Karen Hanson's Innovation in Teaching and Learning Initiative. While our early efforts included collaboration with a variety of campus service providers (e.g., Academic Technology Support Services and the

Center for Educational Innovation) on Massive Open Online Courses (MOOCs) and grant-funded teaching innovation projects, the eLearning Support Initiative's focus was always on course content. As the program developed, the need to support affordable course content options on campus became apparent. We developed a multi-pronged approach in order to meet the needs and preferences of our diverse faculty, including the provision of:

- Customized digital course packs that can include copyrighted materials requiring student payment, library-licensed material, public domain and open web content, and Fair Use items
- Multi-user, library-licensed ebooks made available each semester based on a comparison of our ebook collection (and potential purchases) with the University of Minnesota Bookstores required textbooks list
- Multiple platforms for publishing openly licensed or open access faculty created textbooks
- Affordable commercial textbook options from publishers via the Unizin Engage platform
- Small grants and robust, customized teams to support faculty willing to replace an existing textbook with a more affordable option

In order to meet the need for affordable content options on

campus, the University of Minnesota Libraries has offered Partnership for Affordable Content grants to Twin Cities faculty since the spring 2015 semester. As of the fall 2017 semester, we have supported the implementation of affordable content in 44 classes, which has impacted over 8200 students and produced an estimated savings of over \$800,000. The Partnership grants are small incentive grants, averaging ~\$1250, that provide faculty with the opportunity to consult about a range of affordable content options they might consider, select the option that best meets their teaching needs and the learning needs of their students, and receive support from a team designed to execute a successful project. The grant money can be used for a variety of things including copyediting, graphic design, student worker salaries (to support the project), technology, and conference travel (to discuss the project with colleagues).

The Partnership grants have mainly led to projects where faculty create new course materials (often eTexts) both for their class and for sharing more widely online. Throughout the course of these projects, we have gained a great deal of experience that has informed our processes and practices and might be valuable to others considering these efforts. Some of our most important lessons learned, those that might be most helpful to know about or consider when beginning this work, include:

- Reimagining the “textbook” (i.e., moving beyond the traditional textbook model) to best meet faculty and student needs
- Dealing with copyright issues

- When offering open access materials or applying open licenses to newly created materials
  - Related to the use of images and other visual materials in the production of new learning resources
- Choosing the best platform for “publishing” new course learning materials

## Reimagining the Textbook

Many efforts around open educational resources (OER) focus on producing high quality textbooks via the same or similar processes used in the production of traditional textbooks, and achieve great success (see [OpenStax](#) as an example). During the course of our projects, however, we discovered that faculty are often not satisfied with the traditional textbook approach and are looking for new ways to think about and present textbooks in their courses. For example, one faculty member in Aerospace Engineering was already providing his students with an “alternative textbook” that contained many pages of handwritten equations and the methods for solving those equations. Another faculty member exploring sensitive discussion topics, like racism, wanted to create a unique compilation of materials including brief introductions and links to additional readings and media materials on each topic in the newly developing field of Design Equity. Finally, another faculty member used a range of open textbook chapters and news articles to create the best



possible textbook for her students on Communication in various science fields. When working with faculty to create and publish new course content, we have found that a variety of drivers can and should inform the final product:

- What type of textbook will best meet the teaching and learning needs of the faculty and students?
- What types of media or interactive components are needed to support the best possible learning experience?
- How might we think differently about course content or textbooks for a specific discipline in order to provide the best learning materials possible?
- Does material need to be current and relevant and therefore updated regularly?
- Is the “textbook” a combination of new material created by the faculty member in combination with other existing resources, or is it a completely new work?
- Is the work being produced by multiple authors and how can we best facilitate the creation process?

Rather than focusing on traditional textbook options, our work with faculty has provided the opportunity to push the boundaries of what a “textbook” is or can be, opening the door for us to continue working with faculty to adjust and adapt learning materials to support them in the classroom.

## **Copyright Issues (Open Licensing/Open Access and Use of Images/Charts/Graphs)**

Copyright issues surrounding the production of eTexts and other new learning materials can be complex and difficult to navigate. Having a well-informed team and early conversations about these issues can help prevent headaches later in the production process.

### **Open Licensing/Open Access**

If the expectation of your program is that a faculty member will share their eText with the world, it is important to discuss which sort of open licensing (providing specific information that tells users what rights they have to reuse the material provided – like the options provided by [Creative Commons](#)) or open access (content made freely available online but without specific permissions for reuse) rights your effort expects to be assigned to the final product. Both open license (OER) and open access (OA) options can be difficult for authors to comprehend if they have only published via traditional models in the past.

Explaining the benefits and consequences of OER and OA choices (perhaps in multiple early conversations) will expedite the publishing process and avoid potential misunderstandings about the rights and access these alternatives provide to others. Some institutions utilize formal memorandums of understanding (MOUs) signed by the faculty and the “publisher” to ensure expectations are compatible. Whether your approach to dealing

with copyright issues related to the publication of new eTexts is formal or informal, clear and frequent communication is key.

### **Use of Images/Charts/Graphs**

One of the most challenging issues to deal with when supporting faculty creation of new openly licensed eTexts is determining whether or not particular images can be used in a text that will be shared broadly. Faculty frequently come to the table with a range of images they have used in their teaching and would like to include in their publication. It is often difficult to discern where the images originally came from which impacts the ability to determine who owns the copyright. In order to ensure others have the right to reuse all of the content in an openly licensed publication, it is crucial to determine that images are in the public domain or covered by an open license. While Fair Use can be considered, this creates complications for future users because each future user then is responsible for determining whether or not Fair Use applies to their particular circumstance.

Since our goals for the outputs of the Partnership grants included sharing content as broadly as possible for reuse by others, we determined that any openly licensed content we published would contain only items that were readily available for future reuse.

Examples include items that the faculty member “owns” and agrees to license for reuse, those in the public domain, and those already licensed for reuse. Again, early and frequent conversations with faculty members and the project team help avoid the gathering of new images that do not fit these criteria.

Additionally, we have found it useful to provide faculty with a range of online resources and/or mediated searching to discover images that meet the criteria for reuse and that represent the desired concepts. Finally, in some instances, new charts and graphs may need to be produced—if in-house expertise doesn't exist either in your department or among faculty support resources, then get creative and seek help from students in graphic design courses, graduate students in the discipline, or from contract workers (perhaps using funds from the provided incentive grant).

Dealing with images and other copyright issues can be a time-consuming process. The better prepared your team is to deal with copyright and the earlier you catch issues related to images and copyright, the more time you can save in the long run.

## **Publishing Platforms and eTexts**

Since the advent of the internet, the word “publishing” has taken on new meaning. Almost anyone with access to the right technology can author and post content with minimal expense. Early open access or openly licensed textbooks were often self-published. The model for publishing open textbooks and other OER materials has continued to develop and change in the last 20 years and recent developments have provided new processes, platforms, and formats, as well as additional support structures for the production and publishing of these materials.

Since the internet is often the primary publishing mechanism,

eTexts are typically the most popular of the affordable textbook options provided to students, but this isn't always the case. The internet also offers options (depending on the output format of the eText) for readers to acquire a print on demand version of these books via services like Lulu.com. The jury is still out on student opinions about eTexts vs. print texts ([an analysis of opinions from University of Minnesota students](#) will be available later this year) and also on how well students learn using electronic vs. print materials, so an option for an inexpensive print version of an affordable online textbook can be beneficial.

When it comes to publishing affordable textbooks, it would be great to point to one platform and indicate that it is the “solution” when considering this sort of publishing—but once again, that isn't actually the case either. When it comes to determining the best publisher platforms for affordable textbooks, the answer is often “It depends.” We currently publish a majority of our open textbooks via a locally hosted Pressbooks platform. We have, however, encountered circumstances where the textbook had to be produced in an alternative format—for example, when a book requires more robust support for math based content. Discussions with professionals considering “publication” at a variety of institutions provided some important questions to consider:

- Do you want to host a local publishing option or purchase access to an externally hosted option?
  - Can existing infrastructure (like an institutional repository or other OER

repository) be used to “publish” affordable course materials, especially if funds and technical support aren’t available for a new platform?

- Can you gain access to a publishing platform via a consortium or group?
- Do you need a simple publishing interface to input content or do you need a backend that supports a variety of processes including editing and review of materials?
- Based on your program and institutional values, do you want to provide an open platform or a vendor provided platform?
- What formats do you want to be able to provide students (to provide the broadest possible access for students with varied abilities, to allow items to be printed, etc.) and which platform(s) will meet your needs?
  - Does the selection of a particular publishing platform limit access to materials due to compatibility issues (e.g., texts that can only be read on Apple devices or texts that cannot be used on Apple devices)?
- Do you need more than one publishing platform to serve the needs of your faculty/students and can you support more than one platform?

- Will the platform integrate easily with your learning management system?
  - Does the platform allow authors to embed or use a variety of media types?
  - Does the platform allow for the integration of interactive components that will reinforce the student learning experience?
- Do you plan to charge for some or all of your eTexts and does the platform support both options?

No matter where you land in the selection of a publication platform, you will likely encounter new projects that will raise additional questions and force you to push the boundaries of what you have already considered or implemented. In the end, the ability to be flexible and adaptable, as well as to provide creative solutions, will often be the harbinger of success when publishing eTexts.

## Conclusion

Implementing an affordable content program that provides for the publication of eTexts is both a rewarding and challenging experience. The information and lessons we provided above (focused on reimagining the textbook, copyright issues, and publishing platforms) are just the tip of the iceberg. The discussion could continue and cover additional topics, including:

- How do we “deposit” new eTexts in the appropriate

repositories and/or make them discoverable (via Google, Google Books, Amazon, etc.) to users who will find them valuable?

- How do we make available additional publishing support services like copyediting, graphic design, provision of ISBNs, and more?
- How do we create sustainable models, including the provision of revisions, once an affordable eText has been created?
- How do we create, acquire, and share necessary supplementary materials (slide decks, question banks, tests, and data files) effectively?
- How do we deal with storing and providing access to multiple versions of the same eText or the accompanying supplementary materials?
- How do we create culture change at each of our institutions to move the dial on the issue of affordable content in a significant way?
- How do we create systems and processes that provide for collaboration across our institutions to create additional affordable content and supplementary materials?

While there is clearly a great deal more work to be done, we have witnessed growing momentum and support for tackling these issues and we are optimistic that together universities can make great progress.



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18.

## Oregon State University Affordable Content Initiative

*David Goodrum, Director of Academic Technology, Oregon State University*

Oregon State University has formed an affordable learning initiative based on the idea that *earning a degree is a journey, and buying textbooks shouldn't be a roadblock*. Our goal is to ensure that 100 percent of Oregon State students have no-cost or low-cost access to course materials on the first day of class.

Our librarians at Oregon State work with faculty to identify full text ebooks, journals, and other course materials already owned by the university. The library also provides resources for understanding and exploring open educational resources (see: <https://guides.library.oregonstate.edu/OpenEd>).

The Open Oregon State unit, a part of Oregon State Extended Campus, works with faculty to provide open textbooks and other no-cost course materials. Oregon State faculty have authored many open textbooks, and dozens more are in production (view the catalog at: <https://open.oregonstate.edu/textbooks/catalog.htm>). In 2018, Open Oregon State also issued a new request for proposals for Baccalaureate Core Open Textbooks, where our faculty can obtain financial and personal assistance to adopt, adapt, or author open textbooks and other no-cost or low-cost course materials.

The Oregon State Libraries, Open Oregon State, and the Academic Technology unit in University Information and Technology continue to partner with the OSU Beaver Store (a student-governed nonprofit company). We are focused on approaches to provide day-one access and no-cost and low-cost course materials, including exploring the use of the Unizin Engage eReader and Unizin-negotiated pricing with publishers for eTexts and digital learning tools.

## 19.

# ALX and Faculty-Produced Content at Ohio State

*Stephanie Orr, Director of Learning Experience, Office of Distance Education and eLearning, Ohio State University*

### Introduction

The [Affordable Learning Exchange](#) (ALX) was created at the Ohio State University to help instructors take ownership of their courses and content. Operating out of the [Office of Distance Education and eLearning](#), the group helps faculty navigate the waters of affordable resources and find creative solutions that promote student savings. This includes re-imagining the textbook, encouraging innovation in content production, and empowering faculty through grants and training opportunities to adopt, adapt, create and share open educational resources whenever possible.

## The ALX Model and Its Partners

ALX funds projects that help bridge the cost gap for students, while promoting excellent pedagogy and maintaining ownership of teaching and learning tools with the experts – Ohio State’s world-class faculty. But one size does not fit all: Faculty are encouraged to select resources that maintain the excellent teaching and learning experiences that students expect. Because of this, solutions can include a combination of free and open resources and original, faculty-produced content.

ALX utilizes the combined expertise of its partners across the university, including the [University Center for the Advancement of Teaching](#), [University Libraries](#), the Office of Distance Education and eLearning, and the [Undergraduate Student Government](#). Thanks to the proficiency of these groups, ALX offers faculty guidance each step of the way.

## Digital Publishing with ALX

Digital publishing is a pillar of the ALX offerings, as many faculty undertake projects that require some amount of original content production. Publishing with ALX began as the Book Launch program, which boasted three cohorts consisting of 30 authors who ultimately created 16 books. When Book Launch became part of the catalog of ALX support offerings, publishing transitioned from the iBooks platform to WordPress-based

Pressbooks. This switch allows faculty authors to benefit from a familiar editing interface, a wide variety of exportable formats for reading on-the-go, flexibility in student device compatibility, and the ability to revise and re-export even after the initial publication.

Over time, the [Pressbooks community](#) at Ohio State has grown to include 128 users with 16 publicly and freely available titles, and over 100 titles that are either privately published or still in development. Learn more about a few of the projects below.

## A Quick and Dirty Guide to Art, Music, and Culture

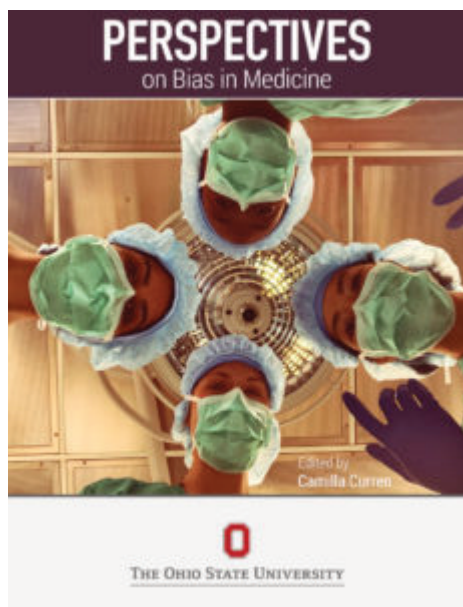
*by Clayton Funk*



This book covers popular art and music since 1945. Funk was one of Pressbooks first users and was involved in the pilot program. Through the authoring process, he learned the importance of self-editing, and ultimately decided not to include all the material he covered in his course in the book. What resulted is a lean, widely adaptable book that served as an important part of his course, which he conducted using a triangulation of resources including this book, the Carmen learning management system, and his class website.

## Perspectives on Bias in Medicine

*by Camilla Curren, MD*



The audience of this book is not only medical students, but also practitioners looking to improve the quality of their care. Based on the Harvard Implicit Bias Test, the book includes video interviews with both patients and care providers. These interviews represent an



exciting collaboration with the medical professionals at Ohio State, and bring readers right into the hospital while they are learning. Curren was passionate about incorporating rich media content to bring the book to life online.

## Environmental ScienceBites

*edited by Kylienne Clark, Travis Shaul, and Brian Lower*



This title began as an iBook, and was integral in understanding the shift to Pressbooks. *ScienceBites* features a collection of student-authored essays on various environmental issues, edited and assembled by faculty coordinators in charge of the course. The book was so successful it necessitated a second edition, which has just recently been published. Having students author this textbook inspires increased engagement and presents an opportunity for young people to take an active part in their own education. The result is a source of pride for all involved.

## Innovations in a Learning Management System

ODEE Master Course Term

Home

Announcements

Syllabus

Modules

Assignments

Discussions

People

Grades

Conferences

Collaborations

Quizzes

Outcomes

Files

Pages

LockDown Brow...

Settings

Library Link

VIEW ALL PAGES

### Full Textbook Contents by Topic

#### Introduction

[An Introduction to the Science of Social Psychology](#) ⚡ (Noba)

[Introducing Social Psychology](#) ⚡ (Stangor)

[Defining Social Psychology: History and Principles](#) ⚡ (Stangor)

[Affect, Behavior, & Cognition](#) ⚡ (Stangor)

#### Research Methods

[Conducting Research in Social Psychology](#) ⚡ (Stangor)

[Research Methods in Social Psychology](#) ⚡ (Noba ⚡)

[Conducting Psychology Research in the Real World](#) ⚡ (Noba)

#### Social Cognition

[Intro to Social Cognition](#) ⚡ (Stangor)

[Sources of Social Knowledge](#) ⚡ (Stangor)

[How We Use Our Expectations](#) ⚡ (Stangor)

[Social Cognition and Affect](#) ⚡ (Stangor)

#### Self

[Intro to the Self](#) ⚡ (Stangor)

[The Cognitive Self: The Self-Concept](#) ⚡ (Stangor)

[The Feeling Self: Self-Esteem](#) ⚡ (Stangor)

[The Social Self: The Role of the Social Situation](#) ⚡ (Stangor)

Faculty content creation is not only for textbook authors; many of ALX's grant winners have assembled their own teaching

artifacts by curating existing open resources and hosting them in Canvas. In Social Psychology, Melissa Beers created a new “textbook” by combining relevant chapters from open textbooks. Pictured is the table of contents that Beers assembled in Canvas in order to present a familiar approach to students. Each chapter linked out to the assigned reading, so students could find everything they needed in their LMS as usual. Although the resulting product looks like a textbook, the method allowed Beers and her students to break free from the limits of a static text, and ensure materials were more closely tied to the topics covered in class.

## Conclusion

From the University of Iowa’s “Learning Design Collaboratory” to Oregon State University’s “Affordable Content Initiative,” the four universities in this section clearly illustrate efforts to reduce the cost of traditional textbooks. Yet, they also suggest efforts to step back and reconsider the pedagogy associated with the traditional textbook. In a world of pervasive technology (of which the university classroom is certainly part), all of the innovative approaches described in the preceding pages suggest the importance of allowing faculty and students to engage in active learning, collaborating via interactive features of learning materials. As a result, the work of these four universities invites new thinking on how faculty, students, staff and administrators might also collaborate on new approaches to teaching and learning, both on their own campuses and with external partners.



## PART VI

# Indiana University eText Resources

### Indiana University eText Resources

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