Textbook Affordability and OER: The Experiences of Two Regional Universities

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Textbook Affordability and OER: The Experiences of Two Regional Universities

Linda K. Colding, Peggy Glatthaar, Derek Malone, and Jennifer Pate

Abstract

The high costs of textbooks negatively impact access, success, and retention rates for undergraduate students. Librarians from Florida Gulf Coast University in Ft. Myers, Florida, and the University of North Alabama in Florence, Alabama, have established textbook affordability programs, using course reserves, e-resources, and open educational resources (OERs) to help reduce the textbook burden for their students. Each library has developed a set of best practices for implementation and success that can be adapted by other higher education institutions that are interested in beginning a similar project.
Florida Gulf Coast University and Library Background

Florida Gulf Coast University (FGCU) is a relatively young university. The campus opened in 1997 and our first class graduated in May 1998 with eighty-one students. Primarily a teaching university, 78 percent of our classes are taught by full-time faculty. There are fifty-eight undergraduate, twenty-five graduate, and six doctoral programs with approximately 15,000 students. FGCU’s top three awarded degrees are Communications followed by Psychology and Resort and Hospitality Management. Most of our students, 87 percent, are from Florida. International students and other states make up the remaining 13 percent of the student body.

The Wilson G. Bradshaw Library has a faculty and staff of nearly forty members and many student assistants. There are two wings of the library. The first floor of the four-story east wing includes a 115-seat computer lab, help desk, group study rooms, an Apple computer lab, and a specialty software lab. On the second and third floors, patrons will find the general collection, study rooms, as well as the special collections. The fourth floor of the east wing, which does not belong to the library, has many classrooms. The two-story west wing of the library was one of the university’s original buildings. Library West, as it is known, houses the research desk, the reference collection, study rooms, the Media Production Studio, and more computers. The library’s collection has over 1.5 million items including books, e-books, journals, e-journals, newspapers, DVDs, CDs, musical scores, and microforms. There are nearly 400 online research databases providing access to over 70 million full-text articles.
Background of the FGCU Textbook Affordability Project

Like most college and university librarians, the FGCU librarians sought ways we could contribute to student success. It is an established fact that when students are unable to purchase their textbooks, they do not do as well in class (Senack, 2014). This can lead to failing grades, dropping the class, and perhaps even dropping out of school. Our university’s tuition has remained the same for the past six years. While this helps our students, 69 percent still receive financial aid. While the costs of textbooks continue to increase, there is still an enormous burden on the student. Add to this equation, 42 percent of our students are first-generation students and many courses have high drop, failure, and withdrawal (DFW) rates.

How could the library help? Students frequently asked our Circulation Desk staff if the library had textbooks in its collection. Like most academic libraries, we had made it a practice not to purchase textbooks because they were expensive, frequently change, and were not research materials. We began to ask other libraries if they were changing their textbook philosophies. Within the state of Florida, the University of West Florida had started a textbook project in 2015 with a grant from their provost. They began with purchasing lower-division course textbooks and expanded to a complete purchase of undergraduate textbooks the following year. The requests for the textbooks were skyrocketing at UWF. At FGCU, the provost has end-of-year funds to distribute among the various campus units. In spring 2018, with evidence in hand, the Library submitted a proposal requesting funds to purchase and loan textbooks for students to use within the library. Much to our surprise and delight, we were awarded $40,000 to use in the 2018–2019 academic year.

Implementation

Now it was time to get to work with our campus partners. We worked with the Office of Planning and Institutional Performance to determine the high DFW courses. Once we knew what courses we wanted to focus on, we partnered with the campus bookstore to determine which textbooks
were being used for those courses. With this information, our information analyst created spreadsheets. There were several key factors we wanted to focus on to determine which textbooks to purchase. First, we looked for courses with high enrollment. Likewise, we needed to know which courses had the highest DFW. We also needed to consider the cost of the textbook. The decision was made to purchase textbooks costing $150 and over. With the assistance of the bookstore, we found out the purchase history of the textbooks. If students were not purchasing a certain textbook, we wanted to know why. Was it the cost? Was it because the library already owned a copy? If the library owned a copy of the textbook, was it in a print or electronic format?

Once it was decided which textbooks were to be purchased, there were still a few details to resolve. The end-of-year funds needed to cover two semesters. We needed to make sure we did not use the entire budget in the first semester. In addition, with some high-enrollment courses, we determined multiple copies would be purchased. Circulation statistics needed to be monitored closely as the project moved forward because additional copies could be purchased for any course.

With our textbook shopping list in hand, we met with the campus bookstore manager to work out the details. Prior to any purchase, the bookstore provided us with some wonderful news. They agreed not to take their usual 25 percent profit from sales. That meant not only was the purchase price reduced by 25 percent but we were also able to purchase even more textbooks. We also purchased used textbooks that were in exceptional condition. In addition to e-books already in the library’s collection, several subject librarians used their materials budget to purchase e-books with unlimited simultaneous user access to include in the Library’s textbook affordability project. Once the textbooks were purchased, we prepared to launch the project in fall 2018. Our Course Reserve staff processed over 200 textbooks in one week to ensure the textbooks were ready for the beginning of the fall semester. Processing the textbooks included training staff and student assistants to label, catalog, and enter information into our integrated library system. Before the textbooks could be shelved, space needed to be created for such a large collection of books in our
course reserves section. For staff and student assistants to assist students in searching for their textbooks, they needed to be knowledgeable in searching our catalog as well as the circulation/borrowing policies for the new project.

It’s All about Access

The Library wanted to ensure students had easy access to the textbooks. Although our staff and students’ assistants could assist them in searching for the textbooks, we knew there was much more to be done. Textbooks would be loaned for two hours to be used only in the library. Students were encouraged to place holds on a textbook if it was checked out. Holds could be placed on the textbook before the students even arrived at the library, thus saving the student time. Once checked out, the textbook could be renewed if no one else had placed a hold on it. Other time savers included locating scanners near the circulation desk to allow students quick and easy access. And the service was free. Because of our criteria, we knew not all textbooks being used were included in our project. Therefore, we allowed students to request textbooks they needed when they were not already in the collection. When possible, we purchased those textbooks.

Outreach and Social Media

Once the textbook affordability project was underway, the Library needed to get the word out to our faculty and most importantly, our students. Subject librarians included information in newsletters and e-mails to their faculty to share with their students. We noticed certain textbooks we thought would be in high demand were not being checked out. Once the subject librarians e-mailed the faculty reminding them of the textbook project, we saw the circulation statistics skyrocket! Word of mouth continues to be one of our best marketing tools. They tell their peers about our textbooks, interlibrary loan, and many of our other library services.

Around the library, table toppers were placed in strategic locations and included information about the project. The library’s website was revised
Figure 2. Mr. and Mrs. Bones Malone checking out a textbook to link students directly to the catalog to look up their textbooks. Librarians, staff, and student assistants wore buttons advertising the project. Var-
ious social media campaigns were created. Textbook Tuesdays became a weekly event with posts highlighting textbooks that may not have been used very often but were expensive. We also included social media posts showing how much money students could save using textbooks from our project.

What We Have Learned So Far

After our first year, we reviewed the textbook affordability project to determine usage statistics and ways to improve the service. In the project’s first semester, fall 2018, there were 1,649 loans. The second semester, spring 2019, showed continued growth in usage with 1,872 loans. With the first-year statistics in hand, it was time for the Library to review the service in general. We sought ways to improve the project. One improvement was to increase the involvement of the subject librarians in the selection process. No longer did we use just the DFW statistics, high enrollment, and cost. We now sought input from the subject librarians who were familiar with the courses in their subject areas. We also continued to fine-tune our access services to ensure students could take full advantage of the project. In addition to Facebook, we expanded our social media marketing to include Instagram and Twitter.

With adjustments made, there were 3,541 loans in fall 2019. This number is more than fall 2018 and spring 2019 combined! There were 1,726 loans for spring 2020 through the first nine weeks of the semester. We were on track to exceed spring 2018 loans. Because of the COVID-19 crisis, on March 16, 2020, all our courses went online and our campus, including the library, went virtual. We have continued to support our students by scanning needed chapters from the textbooks.
Figure 3. Textbook Tuesday
Did you hear? Many required textbooks are available at the circulation desk for 2-hour loans. Search our catalog or contact us to see if we have the book you need.

library.fgcu.edu

Figure 4. Table topper and button graphics
The Road Ahead

The textbook affordability project continued into its second academic year, although we encountered a serious problem. Once again, in spring 2019, a request for end-of-year funds to continue the program was submitted to the provost. This time the request was not approved. How would we be able to continue to purchase new textbooks without those funds and no additional increase to our overall budget? It was not easy. The head of Collections Management and our E-Resource librarian managed to realign other online resource subscriptions. This cost-saving effort saved money in the short term, which could be applied to the textbook affordability project. Nonetheless, funding issues for the project remain.

Sustainable funding for such a project should be included in the initial development. As our project moves forward, we will need to determine additional funding sources. During our Lively Discussion at the Charleston Conference 2019, we learned from our audience that involving student government, Greek, and faculty senate organizations are crucial in building a sustainable project. When possible, the library could solicit funding from the student government and the faculty senate since both groups are important stakeholders and users as well as key players. There is also the prospect of having students and faculty donating gently used textbooks. Funding from donations from foundations, grants, and Friends of the Library may be additional funding sources.

Since the COVID-19 crisis began, like most universities and their libraries, our library is unsure how we will continue to fund our textbook affordability project. We are aware that budgets will be cut and the possibility of receiving end-of-year funds may never exist again. We intend to use our imaginations and find funding to continue this valuable project. Now more than ever, programs like the textbook affordability project need to continue for our students who may face economic hardships in the years to come. We will continue to be flexible to meet the needs of our students who will continue to need access to textbooks. This may mean scanning a chapter they need or requesting an earlier edition through interlibrary loan. The COVID-19 crisis has presented us with new chal-
lenges as we adjust and are flexible to consider new ways to provide access.

University of North Alabama and Collier Library and Information Services Background

Collier Library and Information Services is located at the center of the University of North Alabama. The ground floor of the library houses the Harry L. Smith Student Commons Area that includes a makerspace, computers for student use, a café, and the Library Help Desk. The Library Help Desk is where students can check out materials, request reference assistance, and access our growing collection of reserve textbooks. The library also supports a robust liaison program covering both academic and nonacademic departments on campus. Librarians and staff routinely converse with departmental faculty and staff concerning both physical and electronic library purchases that will support research needs and student learning. Thus, a constant reassessment of resources is facilitated and more strategic buying opportunities are presented.

Background of the University of North Alabama

Textbook Affordability Initiative

The Textbook Affordability Initiative is a multifaceted initiative composed of three main strategies: purchasing textbooks for high-enrollment courses, strategic purchasing of library databases and content to supplement or replace traditional textbook purchases, and promotion of OER adoption. These ideas merged from separate work on our campus. The University Librarian was looking for ways to help students with the financial burden of high-cost textbooks by instituting new practices in purchasing textbooks and placing them on reserve. Additionally, the library wanted to prioritize collection development practices that would increase usage and see more guaranteed commitment from faculty to leverage databases and library purchases in their courses. Thus, more input is sought externally in
Figure 5. Collier Textbook Affordability Initiative
purchasing content that can be used as a textbook replacement or course supplement. Simultaneously, the Scholarly Communications Librarian was one of the leaders of the OER movement on campus aimed at increasing faculty knowledge and adoption of OER in place of expensive course materials. These ideas merged perfectly to form the three critical components of the Textbook Affordability Initiative.

This Textbook Affordability Initiative is entering into its second academic calendar year with strength and momentum. We built into the library’s strategic plan a priority to create collections that were not static. Instead, the focus is on building collections that adapt to the user needs—Priority One: Build and Maintain Evolving and Responsive Collections. Strategic content purchases and reserves are a major component of this priority. Our purchases are aimed at being high-impact and highly used and the purchasing decisions are informed by the library liaison’s work with their department faculty. For example, an anatomy resource was purchased in both desktop and augmented reality format as a traditional text replacement and supplement for a few of our departments.
Collier Library and Information Services Strategic Plan
2019-2024

Vision

Collier Library and Information Services will function as a critical partner to every member of the University of North Alabama pride and as a leader within the state by being an intellectual centerpiece physically and virtually, rooted in discovery, research, scholarship, and information fluency.

Mission

Collier Library and Information Services supports the strategic plan of the University of North Alabama and the enrichment of our pride by providing information resources, instruction, staff, services, and spaces that strengthen information fluency in learning, teaching, and research of the University of North Alabama community.

Strategic Priorities:

Priority One: Build & Maintain Evolving and Responsive Collections – The library will continue to provide information resources that meet the changing teaching and research needs of the campus community and that support and encourage continuous learning. (Supports Theme One: Transformational Student Experience, Theme Two: Academic Excellence and Innovation, Theme Four: Financial Sustainability)

Goals:

- Build agile, flexible collections to support programs and learning
- Engage in ongoing evaluation of electronic subscriptions to ensure continued relevance and value
- Implement new acquisitions models to provide maximum amount of content at lowest cost
- Evaluate print collections and withdraw materials that are obsolete or no longer support existing curriculum
- Lead the state in collaborative collection development
- Make strategic content purchases as replacements for high-cost student course materials
- Reimagine collection development policies and procedures
- Develop systematic communication strategy to inform users about existing and new resources

Priority Two: Provide Innovative Services & Spaces – While maintaining traditional services that remain relevant, Collier Library & Information Services will implement new services and spaces that meet users’ diverse needs. (Support Theme Two: Academic Excellence and Innovation)

Goals:

- Lead the campus in the identification and promotion of Open Educational Resources
In the first semester of the Textbook Affordability Initiative, a list of required textbooks was provided by the bookstore. The library took that list and referenced it with the course enrollment list. Our Access Services
department then checked to see what had already been purchased by the library or loaned to the library from departments for the reserve shelf. Courses that we did not have books for that had high enrollments with
multiple sections per course were identified and from that, textbooks were purchased. Liaisons were asked to notify their departments of the textbook availability and to request that information to be included on the syllabus for each course/section.

The process has changed significantly since the initial implementation. Coordination was needed to run this program properly. The Library needed an effort from external departments to share information regarding textbooks that were going to be used. Now, departments relay what textbooks are going to be used for fall, spring, and summer semesters. This is done twice annually in October and March. The course lists are still referenced, but liaisons are also asked to contact their departments and ask if there is a textbook they would like to have purchased for reserve, or if there is one that they could loan to the library as a personal copy to place on the reserve shelf.

During the first year of the program, the library did not assess usage. However, now that the program is fully developed, library personnel will be fully analyzing usage each semester. This data will be a critical element in library discussions with departments regarding reserve purchases or donations in the future. It will also help us relay the importance of the initiative to administrative departments, specifically showcasing the savings passed along to students.

Reserves will be purchased, again strategically, as we attempt to get more current textbooks on our shelves. Ultimately, the goal is to have current text materials within three years on the shelves. Reserve material purchasing, usage, and assessment will experience heightened relevance as more staff time can be allocated toward them moving forward. Additionally, when the initiative started, the library did not have nonacademic liaisons. Now that we have moved in that direction, we are able to relay to more voices with student connections that textbooks are available on reserve. It is interesting to note that during the COVID-19 pandemic closure we ran a retrieval service and our most requested material aside from laptops during that closure was reserve textbooks. They were used for reading, studying, and open-book exams. Importantly, our students who borrowed them knew of their availability. They requested specific text-
books by name, knew they could use them, and even thanked us anecdotally when retrieving for usage.

**Textbook Affordability Initiative—Library Content Purchases**

Strategically, Collier Library and Information Services is having significant conversations when it comes to content and subscription purchases in the future. As consistently large budget increases are outside the realm of possibility, the library is looking for ways to maximize content and minimize cost. One of the ways the library can maximize content and simultaneously help the student user is by including external departments in the discussion pertaining to database subscriptions that could replace traditional texts and course materials. The library can do this in a variety of ways. First, library liaisons can make external faculty aware of current content that could be used to replace traditional course materials or could be used to supplement traditional course materials. In addition, the library, when presented with a possible purchase from a department or by a vendor, can initiate conversations about how this purchase will be used as a teaching component. Collier Library is moving forward in both directions.

Interestingly, when library faculty have conversations concerning the replacement of textbooks with acquisitions, it seems to lead to more departments being suggested as a potential beneficiary. For example, a replacement resource could reach over multiple departments. Something that was initially perceived as Biology content could be used for Biology, Kinesiology, Nursing, and Chemistry. In the future, strategic analysis will allow the library to focus on purchases based on their usage and ability to relieve costs for the user in both singular disciplines and across a broad range of disciplines.
Textbook Affordability Initiative—OER

The University of North Alabama’s 2019–2024 strategic plan includes the aspiration for the faculty to “Adopt, implement, and utilize Open Educational Resources (OER) in half of all academic programs.” To help the university achieve this goal, the provost initially formed a three-member working group consisting of the Scholarly Communications Librarian, a Cataloging Librarian, and the Director of Educational Technology. The group has since expanded to include an undergraduate student who is a member of the Student Government Association (SGA), a tenured faculty member, a nontenure track instructor, and a student engagement specialist who works with the campus food pantry. One of the first initiatives this group undertook was a faculty survey of OER awareness and use. Using the data from this survey, the group then began working on implementing OER awareness programs. Since the ultimate outcome of this aspiration is to help students with the burden of textbook and course material costs, it fit in perfectly with the Textbook Affordability Initiative that Collier Library was working on, so the working group started implementing awareness efforts with the support of the library.

Helping faculty understand what OER is and how it functions was one of the first priorities. Collier Library cosponsored two days of presentations and a workshop by a leading OER expert. All sessions were held in the library and were at maximum capacity each day. The library also successfully applied for the ACRL Scholarly Communications Road Show, which was a one-day seminar on campus to help librarians understand copyright and how best to help faculty with open-access publishing and OER. The group, in conjunction with Collier, is looking at bringing other experts to campus including copyright and fair use workshops for faculty. These workshops were initially scheduled for October of 2020, but the scheduling has been impacted by the COVID-19 pandemic.

To help increase student awareness of the OER efforts, the Scholarly Communications Librarian met with the SGA to discuss how students can advocate for OER with their professors. As part of her presentation, she also discussed the library’s current efforts for textbook affordability,
including the growing collection of reserve books. From this meeting, the student member of the working group who is also an SGA senator drafted a resolution that passed unanimously, in support of OER on campus. SGA is also planning outreach events to the student body for the upcoming semester. What those outreach efforts will look like depends on if we are back on campus for fall or if we are still operating virtually.

The working group formally launched their provost grant program to encourage adoption of OER during the last week of the spring semester. The call for proposals not only included adapting/adopting or creation of new OER but also will accept proposals that included licensing e-textbooks, e-reserves, or other library-subscribed resources. Since Collier Library is focusing on strategic purchases moving forward, it was a way to support and publicize what the library is doing in addition to promoting traditional OER adaptation. The scholarly communications librarian created a self-guided online course for faculty, adapted from the courses produced by Affordable Learning Georgia and Open Washington. The response to the call for OER proposals has been exciting and the projects proposed are diverse. The work to achieve the aspiration of having 50 percent of all courses have an OER component by 2024 is well underway.

**Affordable Textbooks and OER Sustainability**

Sustaining a text affordability and OER program must be addressed by numerous stakeholders even before implementation. Involving Faculty Senate and Student Government is crucial since both groups are key players and users. Faculty need to be aware of the project to inform their students. Likewise, students are the primary users of the project and need to ask their course instructors about reducing the textbook burden. It may be possible to secure funding from both groups since it benefits all students. Campus administration needs to be approached for funding, such as a grant program for OER adoption or creation, or library budget increases for textbook and database purchases. In addition, funding through donations, such as Friends of the Library, Foundation gifts, and special events, may be available. Pitches should be carefully crafted for each of these audi-
ences to highlight what they can do to help move the initiative forward and to maintain momentum.

When additional funding is not available from outside, libraries need to be creative and should consider purchasing e-books when available. However, these e-books should only be purchased with unlimited use. One to three simultaneous users is not helpful for students in large classes. Subject librarians and others who purchase materials should be brought into the process as well. When budgets allow, they may consider purchasing textbooks to be included in a textbook affordability program. Incorporating subject librarians in these discussions increases buy-in toward the initiative. Their subject liaison collection development then includes alternative textbook assessment and discussion with external departments.

Collier Library and Information Services has aligned their strategic plan with the overall campus plan, specifically targeting OER within a priority. Working to support the campus plan helps us advocate for our Textbook Alternative Initiative and OER projects. We are fortunate that the campus plan has OER listed as a specific aspirational goal.

In addition, the library and administration need to be supportive of continuing education opportunities for faculty, staff, and students. Examples include the ACRL Scholarly Communication Roadshow for library faculty and staff, Harvard’s CopyrightX program for libraries, OpenStax Partner’s program, and membership in the Open Textbook Network (OTN). At UNA, we have had campus administrative support for sponsored workshops and guest speakers for both library and campus faculty and staff. Collier Library has supported the scholarly communications librarian’s participation in OTN’s Certificate in OER Librarianship program, which is proving to be incredibly beneficial for scaffolding a large-scale OER effort. Collier Library has also funded her participation in the Library Copyright Institute, an IMLS-funded cooperative program from Duke University, NC State University, NC Central University, and the University of North Carolina at Chapel Hill, which has helped her answer copyright and fair-use questions for faculty.
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Dr. Linda K. Colding has been the Head of the Reference, Research and Instruction department of the Wilson G. Bradshaw Library of Florida Gulf Coast University for the past five years. Prior to becoming a librarian, Dr. Colding was an Air Force intelligence officer. Since earning her MSLS from Catholic University of America, she has spent most of her twenty-six years in the profession in academic libraries including the Gelman Library of George Washington University and the Hitt Library of the University of Central Florida. Her Doctor of Public Administration was earned at the University of Alabama.

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Peggy Glatthaar has been Head of Customer Services department of the Wilson G. Bradshaw Florida Gulf Coast University Library for the past six years. Peggy manages, develops, and evaluates the library’s Customer Services Department, which includes Circulation, Interlibrary Loan, and Course Reserves. Prior to moving to Florida, Peggy graduated from the School of Information Sciences at University of Illinois Urbana/Champaign Information and worked as a Library Operations Associate in the Main Library.

**Derek Malone**  
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Derek Malone is entering his seventh year at UNA, his third as University Librarian. His background in interlibrary loan and resource sharing cultivated an enthusiasm for getting materials to the user at low or no cost. He continues to explore new material lending opportunities in many areas including technology lending, course reserves, and e-resources. Derek earned a BA in Psychology from Ohio University, an MLIS from Kent State University, and an MBA from the University of North Alabama.

Jennifer L. Pate

Jennifer L. Pate has worked at Collier Library for three years. She manages their Institutional Repository, is the liaison to the English Department and the Department of Foreign Languages, and teaches classes for First-Year Instruction and a graduate course in Digital Collection Management. She is a founding member of the campus OER Working Group and has been researching, presenting, and publishing about faculty use of OER in UNA courses and is beginning research on the impact of OER for UNA students. She graduated from Florida Atlantic University with a BA in Communications and from the University of Alabama with an MLIS.

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