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The Promise of Open Access Textbooks A Model for Success

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The Model

Can open textbooks provide a viable solution to the high cost of textbooks? Are open textbooks quality books? What will encourage faculty to develop or adopt open textbooks? What is a book? How do students prefer to interact with their textbooks? What is the sustainability model for a free and open textbook? How can the development of open textbooks become recognized and rewarded in tenure and promotion decisions? Answers to these challenging questions and more will be offered through the Open Access Textbook Model available from [the Open Access Textbooks website](#). The intended audience for this model includes all who endeavor to bring widespread use of open textbooks into fruition—from faculty authors to student activists to editors at university presses to statewide postsecondary administrators—in the interest of reduced textbook costs, greater accessibility and flexibility of educational materials, and improved learning experiences. The reader's purposes should drive the selection of individually relevant content in this guide.

The model and all information are freely available, thanks to generous support from the Fund for the Improvement of Postsecondary Education (FIPSE). Florida faculty and student survey results, interviews with OER leaders, articles, open textbook authors and faculty adopters, and lessons learned from Florida's open textbook initiative—[Orange Grove Texts Plus](#)—helped to inform the model. This unique Florida partnership reinvents two existing organizations, the [University Press of Florida](#) and [The Orange Grove](#) digital repository, to acquire, develop and deliver open textbooks to students at no or low cost with no new funding. Read on to discover how your institution or state can participate in open textbooks and benefit from the evolving and replicable open textbook model.

This open textbook model is designed to develop and test a set of processes and strategies to establish a statewide open textbook initiative intended to reduce textbook costs for students and increase recognition of faculty for open access publishing as a scholarly activity. The results of this approach will be evaluated and a set of guidelines will be the result. As the academic and business worlds interact and change, new opportunities and challenges arise. The open textbook model is intended to be sufficiently adaptable to embrace new opportunities and meet new challenges.

Open Textbooks Defined

The primary features that differentiate open textbooks from traditional commercial textbooks are cost and copyright restrictions. *Open textbooks*, also known as open access textbooks, are “complete digital textbooks that are accessible online at no cost, and affordable to purchase printed as a book,” according to the [Student Public Interest Research Groups](#) (Student PIRGs, 2009, October 29). Focusing on intellectual property rights more than cost, [U.S. Senate Bill 1714](#) called them, “college textbooks or course materials in electronic format that are licensed under an open license, which is an irrevocable intellectual property license that grants the public the right to access, customize, and distribute copyrighted material” (S. 1714, 2009). According to Frances Rowe (2010, October 26), “In order for a textbook to be considered open, it must be licensed by the author in ways that grant a minimum set of rights to users that are less restrictive than standard copyright. Generally, these rights allow users to

digitally access and print the textbook without incurring a cost” (para.1 1). Open content and open access textbooks can be used, reused, and often remixed and customized under a [Creative Commons license](#) that permits the author/s to retain ownership of their content, yet establish the rights under which the content may be used by others. Creative Commons licenses are free, easy-to-use legal tools that are standardized, globally accepted, and understood in many languages to support open content including open access textbooks. A list of characterizations of open textbooks by various entities can be found in [Appendix A](#).

Dynamic textbooks are open access textbooks that contain links to embedded resources such as original source documents, maps simulations, videos, games, podcasts, animations, and relevant websites. In many cases, low cost, print-on-demand versions of dynamic textbooks are also available.

eTextbooks are electronically enhanced commercially produced textbooks that are similar to dynamic textbooks, but typically with restrictions related to access. For example, the student usually may access or download the textbook from a single computer only and for a set number of days, such as 120 or 180 days, with access expiring at the conclusion of the allotted period. Other restrictions may apply to the number of pages that can be printed at one time.

Needs and Opportunities

The high cost of textbooks for our students has grabbed the attention of our state from the governor to the legislature, chancellors, college and university presidents, faculty, and most especially, the students. According to the Office of Program Policy Analysis and Government Accountability (OPPAGA, 2008, April) [Report No. 08-29](#), “The cost of college textbooks and required course materials has increased faster than inflation, and averages about \$120 per course for common undergraduate classes. Textbook costs vary by discipline, and are highest for life sciences, physical sciences, business, and mathematics courses.” And, for students majoring in these subject areas, the cost of textbooks often exceeds the cost of tuition in Florida. There exists a tangible threat that the development of the intellectual capital through higher education of young Americans is at risk because of escalating costs, and the cost of textbooks is a major contributor. Among the several potential strategies for reducing the costs of textbooks, one solution is capable of addressing the wide range of student preferences: open access textbooks (Student PIRGs, 2010, September 30).

State and federal leadership across the country are in agreement that a solution to the high cost of textbooks must be found – one that is easy to use, cost effective, and makes a significant difference in the cost of higher education. Open Access Textbook (OAT) initiatives are one very promising solution. The 2010 Horizon Report (Johnson, Levine, Smith, & Stone, 2010), a collaboration between the New Media Consortium and Educause, predicted that open content will reach mainstream within one year and the time-to-adoption of open-content textbooks that can be “remixed” – that is customized, modified, or combined with other materials – is one year or less. According to the report, “Part of the appeal of open content is that it is also a response to both the rising costs of traditionally published resources and the lack of educational resources in some regions, and a cost-effective alternative to textbooks and other materials” (p. 17).

Evidence of student engagement in learning has also been attributed to the use of open textbooks. Students in Lisa McDonnell’s Sociology class at St. Petersburg College, 99 percent of them, reported anonymously to her that the [Intro to Sociology](#) open textbook (created by Ron Hammond and Paul Cheney) they used in her class “was awesome, that they really appreciated me using this textbook, and they wished that more professors would actually use it” ([McDonnell, n.d.](#)). [Erik Christensen](#) (2010,

February 17) said students gave rave reviews of the open textbook he adopted for his Physics course at South Florida Community College. “They felt more engaged, did a lot of peer learning It was more the way I like to teach rather than strictly lecture in front of the students.” Open textbooks were found to support inquiry-based, interactive learning and pedagogy in a series of studies conducted by the Institute for the Study of Knowledge Management in Education (ISKME; Middleton-Detzner, 2010, July 21).

Project Goal and Desired Outcomes

The goal of this project is to develop an open access textbook model for statewide implementation and to test its processes and strategies. The intended outcomes of the project are to (a) reduce textbook costs for students, (b) increase the recognition of digital publishing as a significant scholarly contribution, (c) evaluate tools for customization of open textbooks such as [Rhaptos](#), and, (d) through [The Orange Grove](#), provide a systematic means to locate online free open textbooks.

In describing a model for the sustainable support of open textbook authoring and adoption, numerous roles and processes must be taken into account. Students are at the core of the issue because they are the ultimate consumers and the ones who have the need for reduced costs. However, faculty members are the target of the change effort. Without strong sponsors at one or more levels (e.g., national, state, institutional or departmental), little change can be expected.

Many of the processes involved in publishing and distribution are crucial to the acceptance of open textbooks by faculty. Moreover, a critical mass of high quality open textbooks must be available and easily found, and the effort required to create those assets is massive. Finally, various models for sustaining the process financially have been implemented, with varying degrees of success. This analysis will examine the factors that influence open textbook creation and adoption from the perspectives of each of these elements and describe the processes tested and the results they produced.

Overview of Key Partnerships

Building collaborative relationships is essential for the success of a coordinated statewide initiative. Two central entities are the repository where resources are stored and catalogued and a professional publisher that assists authors in the development and review of texts, provides copy editing, and coordinates the many services that prepare a text for printing and distribution. Florida’s repository, [The Orange Grove](#), and professional publisher, [University Press of Florida](#), work as a team to make open textbooks available. Also key to that collaboration are the ancillary producing partner, [WebAssign](#), the print-on-demand printer, [Integrated Book Technologies, Inc.](#) (IBT), and campus bookstores which receive a discounted price for print-on-demand books. All of these partners have important roles to play in the collaborative process of making affordable open textbooks available to faculty and students.

Overview of Available Data

In 2009, the Florida Legislature passed [Statute 1004.091\(2\)](#), entitled *Open Access Textbooks*. In response to this statute, the Open Access Textbook Task Force (OATTF) was formed. The principal responsibility of the OATTF was to present a plan to the Board of Governors to promote awareness of open access textbooks in Florida. In the process of fulfilling its duty, the task force conducted two surveys—one of faculty and administrators and the other of student government leaders—to assess current perceptions about open access textbooks. The complete task force report can be accessed at [OATTF Final Report](#). What follows are brief overviews of the findings of the two surveys.

The faculty and administration survey, which took place in October of 2009, received 2707 responses of which 57 percent were from university faculty and administrators and 43 percent were from state and community colleges. Approximately 10 percent of all responses were from administrators. Two thirds of university faculty selected their textbooks in all cases, whereas 62 percent of state and community college faculty reported that textbook selections were made by their department or a group of faculty.

Slightly more than half of all respondents were not at all familiar with open access textbooks. Only 12 percent had ever used open access materials, and only half of those had used open textbooks. The remaining users of open access materials reported using “other” or “supplementary” materials. Most faculty reported that they would be somewhat likely or very likely to use open access materials in the future (textbooks 53%, supplementary materials 60%, and other materials 55%). The likelihood of them developing materials was lower (textbooks 30%, supplementary materials 38%, and other materials 43%). From among 10 factors provided that would influence their decision to *use* open access materials, “academic quality” was ranked highest and “impact on bookstore” lowest. From among 13 factors provided that would influence their decision to *create* open access materials, “time to develop open access materials” was ranked highest and “impact on campus bookstore” lowest.

The survey of student government leaders, which was administered from November 2009 through January 2010, focused on students’ preferences and the cost of textbooks. The twenty participants in the survey included 16 university and four college student government leaders. Six respondents had used free online texts and 14 had not. They reported purchasing an average 8.3 textbooks for fall 2009. The average cost of textbooks for fall 2009 was approximately \$400.

The student government leaders indicated that multimedia components and practice opportunities were better in online texts than in traditional printed texts. When asked if textbooks were too expensive, 16 said yes and four said no. Factors that respondents judged to be very important for meeting the needs of students were high academic quality, free online access, low cost print copies available for purchase, unlimited printing of text permitted at home, and texts remaining accessible at any time online or via download. Slightly important to neutral factors were attractive layout or good graphics, high quality practice materials, and inclusion of multi-media supplementary materials.

A large majority of SGA leaders indicated they thought their associations would “publicize open textbooks on campus,” and “provide student teams to inform campus faculty about open access textbooks.” When asked if their associations would “assist in funding open textbook creation,” six responded “yes,” 10 answered “maybe,” and two indicated “no.”

Getting Started

Identify Stakeholders and Champions

Stakeholder groups include organizations and individuals at all levels of participation, including faculty, students, and parents, but also governmental, administrative, and student groups that have established initiatives to promote the authoring, publishing, and adopting of open textbooks. Champions are those who clear the field for the triumph of an idea, who argue forcefully and resolutely for the cause. The individuals and groups who support the development and adoption of open content are growing in number and are heard more and more as the trend continues.

Legislatures

Some state legislatures are responding to the high costs of textbooks by sponsoring open textbook initiatives. For example, the State of Ohio has supported an [innovative program](#) that rewarded faculty for the development of open textbooks. The State of Washington has funded, with some federal help, an [open textbook initiative](#) to gather existing open educational resources and organize faculty authors to develop open textbooks and other materials for 81 courses in the state's community and technical colleges. The Florida Legislature in 2009 directed the Florida Distance Learning Consortium (FDLC) to develop a plan for promoting and increasing the use of open access textbooks as a method for reducing textbook costs. The resulting [Open Access Textbook Task Force \(OATTF\)](#) was comprised of members representing Florida colleges and universities in roles of faculty, administrators, student government leaders, business officers, bookstore representatives, and staff of the Florida Board of Governors, Division of Florida Colleges, Florida Distance Learning Consortium, and the University Press of Florida. From the results of interviews, document analysis, and two surveys, the task force produced eleven recommendations to meet critical, identified needs for a successful implementation of open access textbooks in Florida. The importance of the legislature in authorizing the FDLC and the OATTF to conduct the necessary research and submit their final report to the Board of Governors, the State Board of Education, the Office of Policy and Budget in the Executive Office of the Governor, the chair of the Senate Policy and Steering Committee on Ways and Means, and the chair of the House Full Appropriations Council on Education and Economic Development was paramount in communicating the importance of textbook affordability and Florida's efforts to those at the highest level of Florida's education policymaking.

System Level Entities

The governmental bodies that oversee the administration of state policy are of key importance to the successful implementation of an open textbook initiative. In Florida, the Board of Governors oversees the state universities and the Division of Florida Colleges oversees the Florida College System institutions including state colleges and community colleges. These stakeholders can, for example, sponsor awards for innovative faculty initiative such as authoring open textbooks, and can influence presidents, provosts, vice presidents, and deans to recognize digital scholarship as a valuable academic contribution.

Institution Level Entities

The institution is the level at which the faculty member is recognized and rewarded (or not) for authoring or adopting an open textbook. As such, it is an essential locus of influence on the success or failure of an open textbook initiative. Deans, provosts, and vice presidents or deans of academic affairs often have a significant influence on the kind of publishing that is valued in promotion and tenure decisions. They also oversee the institution-wide granting of academic awards to faculty. The messages they send through this role about the importance of digital scholarship can be influential on the academic ethos of an institution.

Faculty

Faculty members are the critical implementers of an open textbook initiative. For open digital scholarship to be recognized by tenure committees and administrators, faculty must first be convinced of its value. Regarding issues of quality assurance, the peer review process, if sufficiently rigorous, should help to gradually advance acceptance of its value. Some faculty members have recommended developmental review by an editorial team as an approach to promote the acceptance of open digital scholarship as eligible evidence for tenure and review purposes.

The Community College Open Textbook Collaborative (CCOTC) established a program to involve faculty in role of trainer and advocate of their fellow faculty members about open textbooks. These Advocate/Trainers are reimbursed for their travel to a workshop where they received training, and they are paid a stipend for the development and delivery of a faculty workshop on their campus. As of August 2010, the 35 Advocate/Trainers had provided a total of 42 adoption workshops. Since then, more training has occurred and more Advocate/Trainers have come on board. For a comprehensive review of the training provided by CCOTC through August 2010, see [Appendix B](#).

Students

As the stakeholders with the most to gain immediately, students are the primary beneficiaries of an open textbook initiative. Lower textbook costs have the potential to open opportunities to students, whose financial aid is insufficient to cover the costs, allowing them to take courses they might not otherwise be able to afford. Students do not have to work as much at low paying jobs to pay for the cost of textbooks. Furthermore, they can help to reduce the burden of student debt, making loan repayment feasible. Student performance might be improved because the text can be tailored to the course by the professor and because the professor engages directly with the text, perhaps with great investment in student success. Students might benefit not only financially, but in the quality of the education they receive. If students were more knowledgeable about the potential benefits offered by open textbooks, relatively small contributions of Student Government Associations' funds to support the development and delivery of open textbooks could significantly reduce students' textbook costs. In November 2010, the Florida State University Student Senate passed a resolution vowing to support faculty in seeking and considering open textbooks when they best fit the needs of the course (see [Appendix C](#)).

Parents and Guardians

Parents who pay some or all of a student's expenses have a good deal to gain from open textbooks, and parents who are affected financially can be a strong vocal force for change. If the cost of a textbook breaks the budget, parents paying the bill are likely notice, and they are also willing to notice that open textbooks are free or available at a minimal cost. Especially when organized as a group, they can become powerful influencers of opinions.

National and International Initiatives

When initiatives occur at the national level, all states can reap the benefits, and typically states may be invited to join in the effort.

The [Student Public Interest Research Groups \(PIRGs\)](#) are an association of state groups which launched a national campaign called "[Make Textbooks Affordable](#)" in 2007. Although the organization recognizes the potential of partial, short-term alternatives such as renting to reduce textbook costs, they have championed open textbooks as the long-term solution that can accommodate the preferences of all students (Allen & Student PIRGs, 2010). Headed by Nicole Allen, this group effort has obtained more than 2,500 signatures of faculty on a Statement of Intent pledging that they will seek, consider, and give

preference to low or no cost resources such as open textbooks if they fit the needs of the class (Student PIRGS, n.d.).

This national initiative required the coordination and active participation of state and campus-centered groups of students with minimal financial resources but substantial human assets. The strong will and determination of their members make them powerful allies in statewide initiatives as well as national ones. Indeed, the Washington Student Association, in cooperation with the State Board of Community and Technical Colleges' (SBCTC) [Open Course Library](#), managed to pass five bills in the Washington legislature aimed at lowering textbook costs during a four-year period (Long, 2010). The work of Student PIRGs convinced Florida State University Student Senator Fred Drake to sponsor Resolution 11 (see [Appendix C](#)), which affirmed the Student Senate's responsibility to help establish a program to seek affordable and accessible course materials for the students of The Florida State University whenever possible.

The Community College Open Textbooks Collaborative (CCOTC) is a non-profit organization funded by The William and Flora Hewlett Foundation and is comprised of 18 member organizations from around the U.S., including for-profit businesses, non-profit organizations, two prestigious universities, a community college district, and the California Community Colleges Chancellor's Office. The goals are to raise awareness about open textbooks and facilitate their adoption. The organization is affiliated with more than 200 colleges and is focused on driving the awareness and adoption of open textbooks in community and other colleges. CCOTC has funded and coordinated peer reviews of over 100 open textbooks and identified hundreds of others. Their personnel developed and sponsored 16 workshops in 8 states in 2009-2010, training over 300 college faculty and staff. This national initiative combines the resources and talents of dozens of professionals to create training and promotional resources to foster open textbook initiatives.

In the interest of using intellectual resources and scarce funds efficiently, Florida's digital repository project and university press are establishing a partnership with Georgia, Kentucky, North Carolina, and Tennessee to coordinate the development of college open textbooks. Each state has committed through their university presses and digital repositories to share in the development of open textbooks, building off the strengths of their different colleges and universities to bring together the best knowledge and information for students. The goal is for each state to produce at least three open textbooks for general education courses. By coordinating which courses each state will focus on, duplication of effort can be reduced and greater efficiency can be realized. By 2013, the majority of open textbooks will be developed.

The first step in organizing such a partnership is to plan and conduct an informational meeting for the executive directors of the university presses and state level repositories within each identified state. It is important to develop an understanding of open textbooks. What role can a state play in developing open textbooks? What is the impact of open textbooks on students and learning? How can open textbooks become part of the business model of the repository and university presses? If the participating leadership is supportive, the next step is to discuss the strengths and resources each state can contribute. This discussion will most likely require a follow-up meeting. An agreement could take the form of a Memorandum of Agreement (MOA). An example of the MOA between The Orange Grove Digital Repository and the University Press of Florida is provided in [Appendix D](#). Finally, a project plan can be developed with follow-up tasks and due dates. The leadership should be established for each state. A web resource for project communication can be established such as [Google Groups](#), [Yahoo! Groups](#), [Wikibooks](#), or [enotes](#).

Establish a Representative Steering Committee

The establishment of an influential steering committee consisting of representatives from the wide range of stakeholder groups is essential for coordinating statewide efforts and securing commitment from leaders who can spearhead the implementation of activities. In Florida, such a steering committee was formed in 2009 to fulfill the requirements of a statute passed by the legislature (1004.091(2), Florida Statutes), which required several activities involving participation by the state's colleges and universities. The principal responsibility of the Open Access Textbook Task Force (OATTF) was to present a plan to the Florida Legislature to promote awareness and sustain open access textbook use in Florida. The 23 member task force had broad representation from Florida's university and college communities – faculty, administrators, student government leaders, business officers, bookstores, and staff from the State University System's Board of Governors, the Division of Florida Colleges, the Florida Distance Learning Consortium, and the University Press of Florida. Ms. Susan Henderson, Associate Executive Director of the Florida Distance Learning Consortium, chaired the task force.

The committee met via web-based conferencing and telephone conferencing to save time and travel costs. During the nine meetings between July 2009 and February 2010, background information was presented to ensure common vocabulary, understanding of issues, legislation, existing initiatives, and market developments related to open access textbooks. A statewide workgroup provided recommendations to the Board of Governors for developing a regulation to guide each of the state's 11 universities in compliance with federal and state legislation. OATTF members collected and compiled data from Board of Governors and Division of Florida College databases to determine the courses with the highest demand for textbooks and other instructional materials. This work led to the prioritization of courses, using the [Florida Statewide Course Numbering System](#), for which development and adoption of open textbooks would have the greatest impact.

Numerous organizations and committees contributed research reports and other resources to design and develop two statewide surveys, one for faculty and administrators and the other for student government leadership, to assess the climate for acceptance and current use of open access materials. The results of these surveys can be found in Appendix B and Appendix C of the [OATTF Final Report](#). The OATTF provided 11 recommendations to the Board of Governors, which are presented in [Appendix E](#). The committed stakeholders, especially when bolstered by the statutory requirements of their work, were able to not only represent their constituency's perspectives, but also motivate their constituency to provide data and participate in surveys.

Branding the Project

The choice of a project name, a tagline, and a logo is part of building a brand. Branding entails communicating a purpose and an identity, and the look and feel of the website and other marketing materials should be consistent with that identity. The name, tagline, and logo should be meaningful and memorable to the target audience. The URL of the website should be sufficiently consistent with the project name that its identity is clear. For examples of open projects, their logos, names, URLs, and taglines, see [Appendix F](#). For a more thorough overview of branding, see Kevin Lane Keller's (1999) [The Brand Report Card](#).

Develop Awareness

Faculty, even if knowledgeable that open textbooks are available, may not be aware that they are peer reviewed and professionally edited, or that they can be customizable to complement their specific learning outcomes and pedagogical style. The diffusion of an innovation has long been understood to

involve the reduction of a potential adopter's uncertainty about the innovation (Rogers, 1995). Some faculty are uncertain about the quality of open textbooks. Others are unfamiliar with the process of modifying a text to better suit their course. To address these concerns, multiple means of communication can be used to repeatedly make faculty aware of open textbooks.

Among the means of communication are text-based materials, web-based information, broadcast media, and face-to-face communication. The types of message and intended result or action on the part of the receiver of communication guide the choices of means of communication and media selected. For example, information targeting a specific group would be a better candidate for a webinar than for broadcast media; video is a poor choice for extensive text but a good option for emotional appeals.

Text-based

Text is ideal for representing and communicating complex, abstract ideas. Text-based media can take the form of print materials such as brochures, posters, whitepapers, research reports, and even open books. Sharyn Fitzpatrick of the College Open Textbooks Community published the open book [#Open Textbook Tweet](#) in 2010 to distribute Twitter tweets about the principles of open textbooks and their benefits to students. A prominent notice on open textbook covers is another way to create awareness of open access licensing. Direct mail is an application of text that can be useful for certain audiences and a single page of talking points can provide legislators and system-level staff with information for supporting an argument. Eric Christensen, a Physics professor at South Florida Community College, created an open textbooks brochure (see [Appendix G](#)). Text can also be published on the Internet through Facebook, Twitter, newsletter articles, blogs, websites, and wikis. Examples of Facebook sites include [The Orange Grove](#), [College Open Textbooks](#), and [Connexions](#). An excellent blog, [WA Open Educational Resources](#), is maintained by Cable Green, Director of eLearning and Open Education at the Washington State Board for Community and Technical Colleges. A wiki on [Open Educational Resources](#) provides a comprehensive resource on the topic, as does [WikiEducator](#). Advocate/Trainer Erik Christensen created the [Open Textbooks Wiki](#) for sharing information about where to find open textbooks.

Web-based

A Web and social media presence is fundamental to a statewide initiative. Regular updates announcing events, activities, publications, legislation, or results of a survey, for examples, are needed to maintain the interest of those searching for information about open textbooks. (For an example, see the [openacesstextbook.org](#) site.) Attractive print and digital marketing materials such as brochures are useful to convey messages to faculty at meetings and special events. For example, Orange Grove Texts *Plus* developed a flyer publicizing the open textbook *Collaborative Statistics* (see [Appendix H](#)). One way to build a community of practice around open textbooks is to conduct a regular series of [webinars](#) featuring presentations by authors, reviewers, publishers, and others associated with open textbook initiatives. Building and maintaining a list of contacts is an important strategy for the effectiveness of email and webinar communication.

Broadcast media

Public service announcements (PSAs) on television and radio stations can have potential for communicating compact messages that raise awareness. Campus radio stations are good outlets for raising student awareness of open textbooks because their audience is largely college students. PSAs are usually most effective when they elicit a specific action, such as calling a phone number or signing a petition. When planning a public service announcement, it is important to decide specifically what you want the listeners to know or do. Modeling of the desired action, whether authoring or adopting, by a likable character can stimulate the empathic impulse to behave similarly.

Face-to-face

The most effective and convincing approach can be through talking face-to-face. An efficient approach to face-to-face communication is speaking at conferences where you can communicate to a large number of people at once. Large sessions are great for planting the basic idea, but one-to-one discussions or training sessions with small groups are often more effective for helping people think outside of the constraints of the current textbook business model. The fewer the people you communicate with at a given time, the easier it is to answer all of the questions an individual might have.

Speaking to large groups at conferences often leads to one-to-one exchanges or small group discussions. People who are interested and have questions seek you out either during the session, immediately afterward, or later, sometimes by email or phone. To encourage this dialogue, be sure to make yourself available and offer your contact information.

Among the most powerful champions of open textbook initiatives are faculty who have recently adopted open textbooks and who have agreed to participate in a program to raise awareness and advocate for open textbooks. Two such programs are the [Orange Grove Scholars](#) in Florida and the [College Open Textbook Advocate Trainer program](#) with advocate trainers located throughout the U.S. These faculty typically receive stipends and are provided training [resources](#), [materials](#), and [guidance](#) by the host organization, but they use their own initiative to plan and implement strategies on their campuses and others. They share their experiences with each other on blogs and develop [reports](#) on their activities.

Design, Develop, and Implement Training for Faculty and Administrators

An extensive training effort to prepare faculty, administrators, and staff for the adoption of open textbooks, conducted by the [Community College Consortium for Open Educational Resources \(CCCOER\)](#) and [College Open Textbooks \(COT\)](#), has been underway for several years. The effort involves Open Textbook Advocate Trainers and Orange Grove Scholars. Sample tasks that Orange Grove Scholars perform include, but are not limited to:

- Contributing items to the repository for their own courses
- Contacting administrators to make them aware of the repository and its capabilities
- Submitting items regarding open textbooks to campus publications
- Arranging and conducting demonstration or training sessions for faculty
- Identifying and submitting resources in their discipline for inclusion in the repository
- Participating in monthly web conferences with other Orange Grove Scholars to discuss successes and challenges
- Inviting faculty to share their resources and search strategies at faculty development workshops and other events
- Partnering with web development/faculty development units to design and develop workshops on repository use
- Scheduling and conducting 1:1 meetings with faculty to help them use the repository and develop resources for their classes
- Asking faculty to contribute to the repository their favorite websites, tools, documents, animations, and resources that they use in teaching.

Training sessions and workshops tend to draw faculty who are seriously considering using or authoring an open textbook. They can be designed to inform faculty about what open textbooks are and are not, how and where to search for open textbooks, and creative commons licenses and how to use them. Training materials could include handouts such as the tutorial on Creative Commons licenses created by Kenneth Leroy Busbee (see [Appendix I](#)).

Software Tools for Authoring and Editing

Word-processing programs are essential tools for authors to develop the text for any book project. Most faculty are familiar with commercial or open source software products such as [Microsoft Word](#), [Corel WordPerfect](#), [OpenOffice Writer](#), [LibreOffice Writer](#), and [Google docs](#) which provide a what-you-see-is-what-you-get (WYSIWYG) interface. If a Portable Document Format (PDF) is the final desired format, these programs can easily perform that conversion, and open source solutions are available on the web to convert document formats to PDF.

Because publishers typically use professional layout tools, they must strip out any formatting code inserted by authors from manuscripts using tools such as [Editorium's FileCleaner](#). Authors may find word processing features helpful to communicate their formatting preferences to editors.

Real-time and asynchronous document collaboration can quickly and easily be achieved for multiple authors using Microsoft software through the use of [Google Cloud Connect for Microsoft Office](#).

However, some writing projects have special requirements that call for specialized tools. If, for example, readability of scientific or mathematical notation is a requirement, manuscripts are often composed in [LaTeX](#), [LyX](#), or some other variant of [TeX](#) editor. TeX is a typesetting language with extensive scientific and mathematical notation features that publishers can work with more easily than with a Word document. Professional editing by a publisher is usually done with different tools, such as [Adobe InDesign](#). LyX has numerous templates that aid the author in outputting correctly formatted documents, such as the example in [Appendix J](#) for APA journals' printed articles.

New online tools continue to be developed that facilitate collaborative authoring, editing, and even reviewing of manuscripts. An in-depth discussion of specific tools would soon be dated. Although this section mentions a few tools existing at the time of this writing for purposes of exemplification, the primary focus of this section is on the considerations one should make when planning a writing project regarding the software tool or tools that are available.

Some important tool features are addressed with the following questions, each of which is elaborated below:

- Can it provide a **collaborative space for authors** to work together with notes or comments and version preservation?
- Is it **commercial or open-source software**? Fee or free?
- Can it output a **printer-friendly** file (e.g., .pdf, .doc, .docx, or .odt)?
- Can it output an **HTML** file?
- Can it output an **EPUB** file for mobile devices?
- Can it output a **DAISY** file for people with text disabilities?
- Does it have a **math formula editor** or support the use of an open-source one?
- Is it a **WYSIWYG** (what-you-see-is-what-you-get) editor or a **WYSIWYM** (...what you mean) editor?
- Does it support **images, audio, and video**?
- Does it conform to **IMS Common Cartridge standards** and **SCORM**?
- Does it allow **easy editing** with automatic re-pagination and updating of the table of contents?

Of course, a question that is critically important to the author of a textbook in one area might be unimportant to an author in another area, such as the importance of an equation editor to an algebra textbook author versus the author of an American history textbook. Some disciplines, such as art history

and medicine, require specialized image reproduction in textbooks, whereas other disciplines, such as English rhetoric and composition, may not require images at all. The answers to these and other questions should be weighted in proportion to their importance to the project.

Collaborative Space for Authors

Authors who collaborate on a textbook can benefit from having a shared virtual space where they can work on the text and, without leaving the page, communicate with their collaborators through synchronous chat, voice, or asynchronous discussion. These web-based platforms or software solutions are sometimes referred to as *groupware* or *computer-supported collaborative work* (CSCW). Hundreds of different open-source and proprietary collaborative workspace solutions are compared on Wikipedia's [List of collaborative software](#) page.

Commercial or Open-Source Software

Circumstances may dictate some of the tools that authors and editors use, including availability and cost. But sometimes the free open-source software is the best available. Many users of [LaTeX](#) have sought a document preparation system that would be easier to use than this aging, open-source software. With only specialized exceptions (such as for representing German characters and perhaps the May 8, 2011 release of [LyX 2.0](#)), the consensus seems to be that nothing is better at what it does, which is to produce perfect typographic output (Unwalla, 2006).

Commercial software has the benefit of employing full-time professionals to write, test, and revise code, rather than rely on volunteers spending their free time, as open-source software usually does. Thus, commercial products like InDesign typically have many features and extensive help.

Printer-Friendly Features

Despite its positive typesetting qualities, a LaTeX file cannot print on a laser or inkjet printer. Instead, it has a utility that converts the code of a publication in LaTeX format to Portable Document Format (PDF) and other formats.

Microsoft Word files can appear differently on different versions of Word, on different operating systems, and on different platforms. The differences are sometimes small enough to be imperceptible, but in some cases can push a page break onto the next page. PDF files do not have such problems. Furthermore, if a Word document contains a font that is not installed on a host computer, Word will substitute another font. When converting a Word document to PDF, fonts can be embedded in the file so that they are available for that PDF document even if the font is not installed on the host computer.

HTML

Sometimes HTML output is a desired product, often as an option to PDF or ePub downloads. The facility and faithfulness of the end result varies, depending on the software. HTML editors such as Adobe Dreamweaver or the open-source [Amaya](#) from W3C are likely to most easily produce Web documents that appear as the designer intends. Saving a document as HTML from a word processor such as Microsoft Word, is an uncertain venture. When doing so, most developers recommend saving the document as Web Page, Filtered rather than merely as Web Page, because of the torturous code produced by the latter. However, a word processor is not designed to develop websites, and an HTML editor will offer more options and should produce better results.

EPUB for Mobile Devices

EPUB, also spelled ePub, ePUB, and epub, is a format standard for display of electronic book content. It is an open-source standard with the extension .epub, which was first established by [International Digital Publishing Forum \(IDPF\)](#) in 2007, succeeding the Open eBook Publication Structure (OEB), which dated from 1999. “EPUB defines a means of representing, packaging and encoding structured and semantically enhanced Web content — including XHTML, CSS, SVG, images, and other resources — for distribution in a single-file format” (IDPF, 2011). EPUB is a format standard used by electronic book readers such as those marketed by Apple, Sony, and others.

DAISY

The [Digital Accessible Information System \(DAISY\)](#) is an international standard for making print books accessible to people with text disabilities. A DAISY book consists of digital audio files containing human narration of the source text, a marked-up file of the source text, a synchronization file relating the markings in the text with the corresponding points in the audio file, and a navigation control file for shifting between text and audio files. Various [open source tools](#) are available for authoring, producing, and converting files to the DAISY Standard, as well as converting between the DAISY 2.02 and 3.0 Standards. The DAISY Consortium maintains a list of [tools and services](#) including authoring tools and converters such as [add-ins for Microsoft Word](#) and guidance for using [Digital Talking Book \(DTBook\)](#) in Adobe InDesign. The source document in Microsoft Word has to be well structured, created using styles, and saved before it can be converted to a fully conforming DAISY book.

Math Formula Editor

Because mathematics uses symbols that are not among the standard [ASCII character set](#), they require a means of creating complex graphical symbol sets that can be inserted into textual material. The software programs that are used to create these symbol sets are known as [formula editors](#). Word processors such as Microsoft Word and OpenOffice.org Writer have formula editors built into them so that they almost seem like part of the host application. For authors who depend heavily on mathematical notation, a separate program that outputs [TeX](#), such as [MathMagic](#) or [MathType](#), may be desirable. Just as important, presumably, would be that the program supports [Mathematical Markup Language \(MathML\)](#), the XML application for mathematical notation for Web browsers. A comparison of formula editors can be found on [Wikipedia](#). The TeX portion would be in a format a publisher can use without transforming or re-creating the characters, and the MathML output would present the formula accurately on most any Web browser.

WYSIWYG or WYSIWYM

The term WYSIWIG, pronounced 'wi-zē-,wig, is the acronym for “What you see is what you get,” a phrase that expresses the very close resemblance of the graphical user interface of the computer on which a document is being composed to the printed image of that document. Word processors are WYSIWYG, but some programs, such as [LaTeX](#), are not. LaTeX is reputed to be WYSIWYM or “What you see is what you mean,” (Evans & Power, 2003) because LaTeX markup language specifies how the typeset page will look in the markup, rather than representing that look on the computer’s display.

Images, Audio, and Video

For a standard print textbook, audio and video sources can only be referred to on the page by listing the URL(s) or by including a quick-reference (QR) code that can be read by scanners or mobile picture phones to download or stream the media.

Appropriate uses of video include instruction of procedures that are awkward or difficult to convey with words. Music can evoke affect and can be used for emotional appeal. When these forms of communication are appropriate, electronic media are favored over the printed page. A wide variety of audio and video formats are available in almost any HTML editing program.



Figure 1.
QR code for
Wikipedia

IMS Common Cartridge Standards

The [IMS Global Learning Consortium \(IMS GLC\)](#) is an international organization dedicated to developing interoperability standards for instructional media with the ultimate goal of ensuring learning impact. The [Common Cartridge](#) interoperability standard provides models and criteria by which digital educational content, learning management systems (LMS), and learning software tools are compatible and functional on all conformant course management platforms. The standard facilitates coordination of publishers, institutions' information systems, and the LMS. When developers of software tools and course content meet the specifications of the Common Cartridge, the products they produce can function in any conformant LMS, such as Blackboard, Angel, or Sakai, for example. For a complete list of members, affiliates, and alliance participants of IMS GLC, see the [IMS members page](#).

Easy Editing

In a word processing program, and in a typesetting program like LaTeX, adding or deleting material automatically updates the subsequent material in the document, such as page numbers and references in the table of contents. But presentation formats such as PDF lack the automation for such updating. Therefore, whenever editing of a PDF is considered, it is naturally better to revert to the original format in which the document was made if at all possible. If it is not possible, software options exist to make the process of editing PDFs easier, including saving the document to a Microsoft Word, Open Document Text (ODT) format, or Rich Text Format (RTF) document. Numerous programs are designed specifically to facilitate conversion of PDFs to other format, and the list is growing continually.

Once a document is in editable form, an important key to organizing the document is the use of styles for every part of the document. This practice applies to all types of documents, and serves as a means of improving organization and consistency throughout a document as well as making editing easier. It enables the author to change the formatting of all instances of a style used in a large document just by editing the style itself. Using styles with headers in a text document allows the automatic creation of a table of contents or table of figures. Help resources of various software tools provide instructions on the use of styles.

Recommended Tools

The following lists of tools comprise the recommendations of various writers. Some links on the lists may go out of date over time, but some lists might be maintained as new versions of tools are released and as entirely new tools appear.

- [20 Hi-Tech Tools and Resources for Writers – August 2009](#)
- [100 Awesome Open Source Tools for Writers, Journalists, and Bloggers – June 2009](#)
- [The Ultimate Writer's Toolbox – 100 Tips, Tools, and Resources for Writers – October 2009](#)
- [Literature & Latte – Links for Writers](#)
- [Links for Technical Communicators](#)

Open Textbook Authorship Case Study

In January 2011, Charlie Mitchell, Professor of Theatre at University of Florida, phoned Susie Henderson, Project Director of the Open Access Textbooks project at the Florida Distance Learning Consortium. Charlie was eager to start writing and editing an open textbook on theatre practice. He was frustrated that his students were paying \$115 for a textbook, in addition to the cost of the plays they had to buy, that was not really an adequate text for the course. As he put it, “acting hasn’t changed much in the last 150 years,” and he was displeased that his students would have to pay for what had been common knowledge for so long.

Dr. Mitchell had done some research on open textbooks and had generated interest among other theatre faculty in taking on the task of writing chapters of the text. He had explored possibilities for funding his project through his school and college to no avail. He had scoured the Web in search of information about who might be able to help him through the process, and he had landed on www.openaccesstextbooks.org where he found Susie Henderson’s contact information. Because he had concerns about digital scholarship being credited by his institution for promotion and tenure, he was interested in the FDLC’s partnership with the University Press of Florida, the imprimatur of which might be influential. He called Susie Henderson at Florida Distance Learning Consortium who informed him about the opportunities and services available to him and his colleagues. He talked about the framework for the book he envisioned, the lack of financial support, and the need for scholarship to count toward promotion and tenure. Ms. Henderson suggested that his book might be one that could be developed with the support of Orange Grove Texts *Plus* (OGT+), the partnership between the Florida Distance Learning Consortium and the University Press of Florida. One can follow the story on [Dr. Mitchell’s blog](#) as it continues to unfold.

Book Acquisition for Orange Grove Texts *Plus* (OGT+): The Florida Distance Learning Consortium and the University Press of Florida

Standard Processes

The standard process for routing a manuscript through the [University Press of Florida \(UPF\)](#) processes involves a series of steps (see Figure 2). When a proposal is received, it is routed to the acquisitions editor who works with the appropriate list. The editor decides whether to invite or reject the proposal. If the proposal is in an academic area in which UPF does not publish, it is generally rejected on the grounds that it is not a good fit for the list. If the Acquisitions Editor believes the proposed project will make a valuable contribution to the UPF list, the manuscript is invited. The Acquisitions Editor reviews the manuscript, gives feedback to the author, and works with the author to shape the manuscript if it is not yet ready to go out for peer review. Once the editor determines that the manuscript is ready, it is sent out for review.

The peer review process serves two purposes, the first of which is to evaluate the manuscript to identify weaknesses that require further development and to give general feedback on the content. The other purpose is to determine the market for the book, including the potential for course adoption. Payment is usually \$125 per review, and readers are generally allowed six to eight weeks to review a manuscript. Readers may choose to remain anonymous, to the extent that state law allows. If peer reviews are overwhelmingly negative, the manuscript is generally rejected. If reviewers are split or find the manuscript promising but lacking in some respects, it is returned to the author with instructions for revisions and the Acquisitions Editor works with the author to develop it further. If reviews are positive, the manuscript is presented to the Editorial Board for approval.

The UPF Editorial Board is comprised of representatives from each of Florida's universities, and they must approve all UPF publications. Prior to the editorial board meeting, board members are presented with a dossier of projects. The dossier includes editorial comments, title budgets, reader reports, and various other miscellaneous information related to each project. The Acquisitions Editor creates title budget using set models. If the board approves the manuscript for publication, UPF holds an internal post-board meeting and finalizes publication plans. All managers and the director need to sign off on the project before moving forward with the project. As managers fill in costs, they also sign off on the project.

In the post-board meeting, the Acquisitions Editor discusses project specifics with production, marketing, editorial, and acquisitions staff. The team reviews the title budget, determines the schedule, and discusses open issues. Once everything is finalized, the Acquisitions Editor produces a contract and sends it out for the author's signature. The contract is then co-signed by the UPF director, and the business department receives a copy of the contract when it is signed. Royalties are processed on an annual basis. Order processing follows a standard procedure.

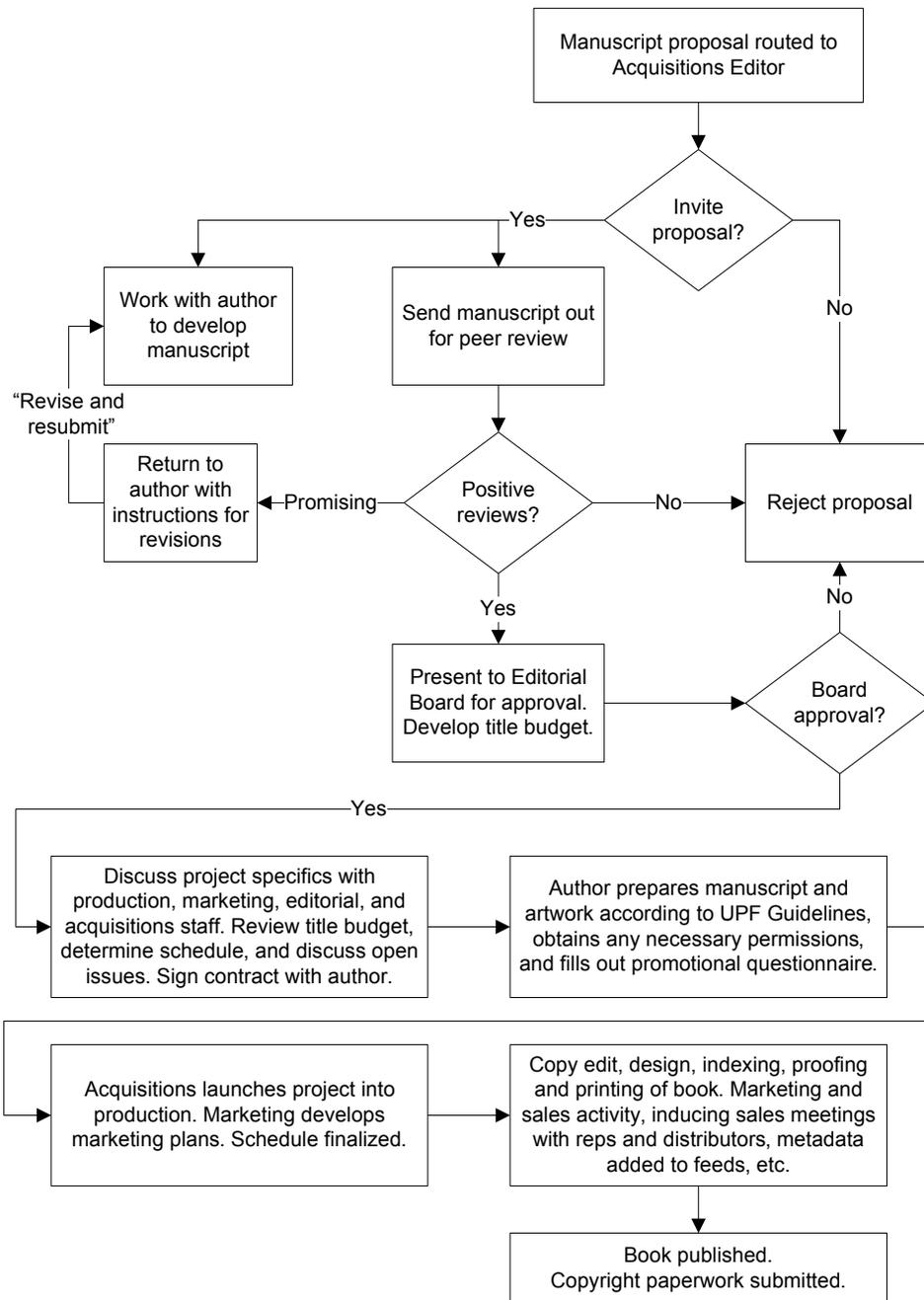


Figure 2. The standard University Press of Florida manuscript routing process.

Next the author prepares the manuscript and artwork according to UPF Guidelines (see <http://upf.com/MSGuidelines.pdf> and <http://upf.com/MSGuidelinesArt.pdf>), obtains any necessary permissions, and fills out the promotional questionnaire. Acquisitions then launches the project into production and the Editorial, Design, and Production department finalizes the schedule with the input of the Marketing Manager. Design and Production evaluates the artwork and recommends changes, if necessary. The Project Editor locates the appropriate copy editor from the UPF pool and manages the project through production. The cover is designed and the book is copy edited, designed, indexed,

proofed, and printed. Authors are responsible for indexing and proofing their own manuscripts. Marketing and sales activity takes place, including sales meetings with representatives and distributors, and metadata are added to the feeds. Finally, the book is published and the copyright paperwork is submitted.

OGT+ Processes

When a proposal is received for an Orange Grove Text *Plus* (OGT+) manuscript, it is routed to the OGT+ liaison at UPF (see Figure 3). The liaison assesses the text and, if she determines that the text is a good candidate for the OGT+ imprint, she creates a digital book file. This file contains the proposal and manuscript (if it already exists), the author's Curriculum Vitae, a title budget, notes about the title's potential for course adoption, and any additional information that might be pertinent to the evaluation of the text. A Digital Routing Sheet ([Appendix K](#)) is created for UPF management to sign off and comment on the project as it proceeds through the various stages.

The Acquisitions department fills in acquisition costs on the title budget, including costs of peer reviews. Acquisitions also fills in a set overhead cost based on the estimated amount of work involved to produce the text. This overhead cost generally falls into one of three tiers: (1) new book (highest cost), (2) book that requires significant work (middle cost), or (3) new to OGT+ book (lowest cost). Each department manager reviews the manuscript and adds estimated costs to the title budget. The manager of Editorial, Design, and Production department reviews the text, estimates editorial and design costs, and requests manufacturing costs from the print-on-demand (POD) printer, Integrated Book Technologies (IBT). These figures are all entered into the title budget worksheet. The Marketing manager enters marketing costs and sets the price. As with the standard manuscript process, all managers and the director sign off on the project before moving forward. As managers fill in costs, they also sign off on the project.

The worksheet automatically generates the number of books needed to sell to break even. Depending on that number and anticipated sales, a subsidy requirement may be added. The Business manager and UPF Director review title budget and sign off on the project.

If necessary, the Editorial, Design, and Production Manager locates and contracts with copy editors or packagers who have experience in textbook publishing and who can work with files of types UPF does not usually work with or have the software to handle (LaTeX, for example). The design department designs the cover and does any other design work that might be required for work with non-standard texts. The Production department produces low-resolution and high-resolution Portable Document Format files (PDFs) of the book. The Production manager attaches the International Standard Book Number (ISBN) to the book, sends notification of the ISBN and final data to other departments, and submits print-ready files to IBT. When the book is ready to go live, the IT manager contacts IBT and asks them to add the book to the shopping cart.

The Business department must:

- a. Determine the break-even point based on title budgets, after which the sales income is split with The Orange Grove, place those figures into their system, track when books reach the break-even point, and generate payment and statements for the Orange Grove once break-even is reached.
- b. Process two sets of POD reports: One for books sold through The Orange Grove site (for which IBT owes UPF money) and one for books sold through UPF (for which UPF owes IBT money).
- c. Process additional royalties
- d. Perform miscellaneous other tasks related to processing subsidies, fees, invoices, etc.

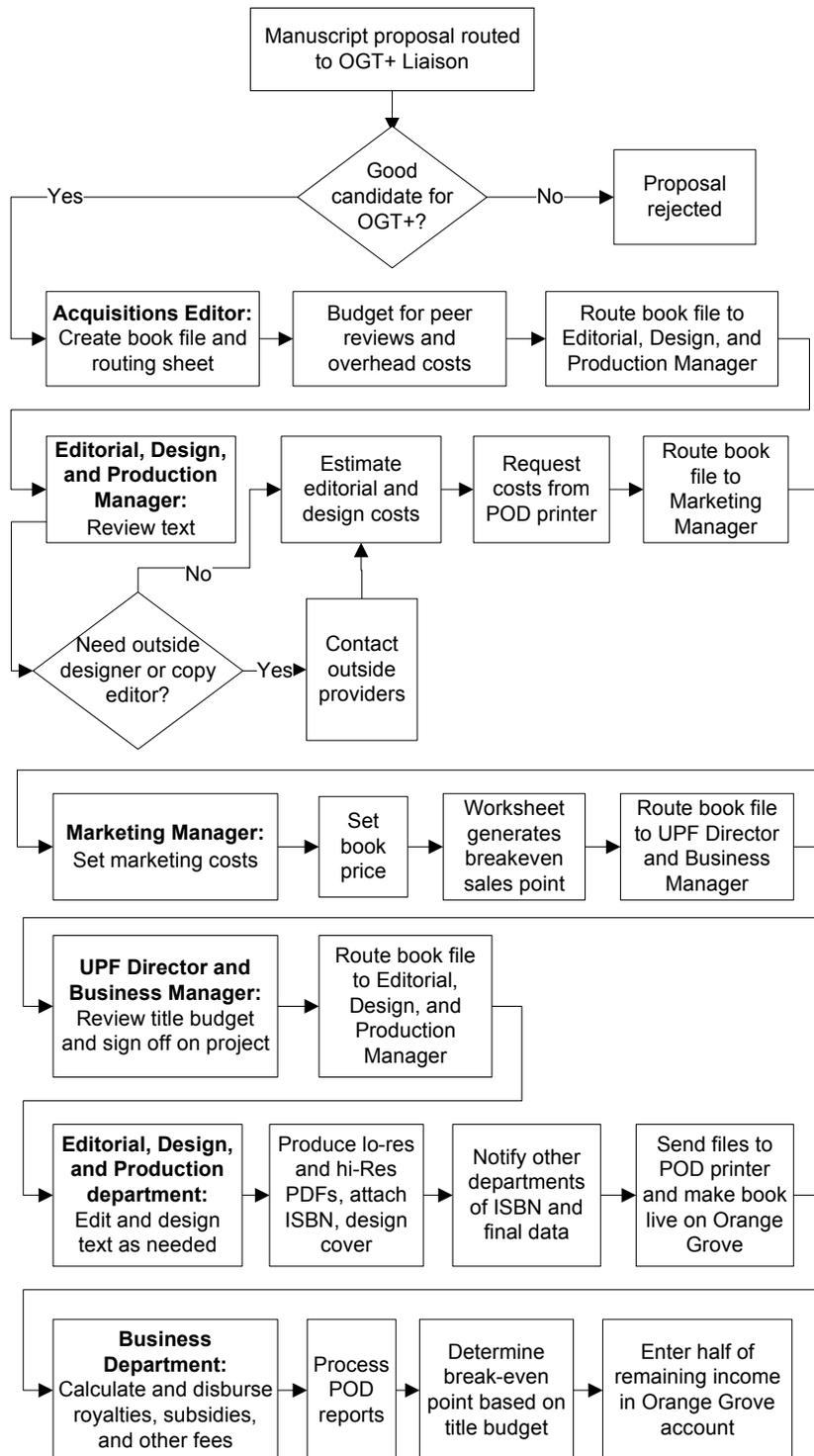


Figure 3. The Orange Grove Text Plus (OGT+) processes for adding an existing text to the collection.

Promoting Authorship

Numerous successes illustrate that authoring open textbooks is possible and adoption can be rewarding for faculty and students.

The Florida Distance Learning Consortium (FDLC) gathered data on faculty use of open textbooks from interviews, focus groups, webinars, and the Open Access Textbook Task Force (OATTF) survey administered in early 2010. Evidence from these sources indicated that the faculty members were concerned about the high cost of textbooks and its impact on students. They generally viewed open textbooks as a potential solution, but perceived several impediments to their development and use. Among their concerns regarding authorship were incentives such as release time or recognition for digital scholarship and support by administration.

Incentives

The concept of openness of scholarly work is readily embraced by some faculty and administrators. The recognition and rewards for open digital scholarship should help to allay the concerns of the wary, even as research institutions around the world commit to open research and scholarship. Recognition from leaders at any level can convey the message that the value of digital scholarship is appreciated. Tangible tokens of appreciation can take the form of honors, fellowships, titles, monetary rewards, or release time.

The Orange Grove Scholars program is a program that rewards faculty for digital scholarship with the express purpose of engaging others in the use of the digital repository. The [Orange Grove Scholars](#) are nominated by FDLC members or The Orange Grove institutional liaison for their leadership capabilities and their interest in digital content. These faculty members operate on their individual university and college campuses around the state and reach out to individual faculty members and departments. A list of potential tasks is provided to the nominees. The tasks are reviewed and all or some tasks are agreed upon by the faculty members and The Orange Grove staff to form the basis of the contractual agreement with the faculty as payment for their services. These faculty members serve at least a two semester commitment. The Orange Grove Scholar/Advisor program is supported by FIPSE funds, and provides an opportunity to explore techniques for increasing repository uptake. Scholar/Advisors serve as the information conduit to department chairs, deans, vice-presidents, presidents. They demonstrate, teach, and request contributions of content from their fellow faculty members. The Orange Grove Scholar has added credibility and interest at the campus level, which is critical for adoption of the repository resources for use in their teaching. The OG Scholars have indicated that it is extremely beneficial to have two individuals working together to share ideas and put on events. This appears to be particularly important in the early stages of adoption of the repository. For a comprehensive account of Florida's initiative to create and sustain a statewide standards-based educational repository, visit the [Online Content Repository \(OnCoRe\) Blueprint](#).

Sponsorship, Advocacy, and Recognition

Federal and State Advocacy and Sponsorship

Federal legislation has accomplished modest objectives for reducing textbook costs, but, as of the time of this writing, the more ambitious federal legislation has been shuffled from committee to committee for more than three years. The stalled federal role leaves open the opportunity for innovation at the state level. Ohio is a state in which the higher education leadership has led the way. In 2008, Ohio began a textbook affordability initiative launched by Chancellor Eric Fingerhut. The value proposition of the textbook affordability strategic plan focused on improving learning outcomes as well as reducing the cost

of textbooks. In a 2010 webinar funded by a FIPSE grant, Steve Acker, the Research Director of eText/Ohio Digital Bookshelf explained the three interwoven strands of Ohio's Textbook Affordability Initiative: work with publishers to reduce costs; engage with open resources by rewarding faculty authors and funding large scale development; and eventually develop a framework for students to construct their own personal learning environments. For a more detailed description of Ohio's initiative, see [Appendix L](#).

Institutional Recognition and Advocacy

College and university administrations can have a powerful impact on the production and acceptance of digital scholarship. The provost of the University of Florida allocated funds to pay Mathematics faculty to develop a series of three calculus open textbooks, the first of which is being field tested at the time of this writing. Such strong support from the administration provides the impetus for faculty to engage in digital scholarship and to consider authoring or adopting open textbooks.

Promoting Adoption

For faculty to adopt open textbooks, they must perceive their value in terms of academic quality. Other important faculty considerations include the time required to find and review them, savings for students, and suitability for their course's learning outcomes and pedagogical style of their teaching.

Respondents to the Florida Open Access Textbook Task Force Survey (OATFF, 2010) ranked academic quality first from among ten factors influencing their decision to use open access materials. A [University of California at Berkeley study](#) (Harley, Lawrence, Acord, & Dixson, 2009) found similar concerns, with 95% of respondents choosing "Quality of content, including editorial review" as a necessary feature for consideration of adoption. The concern is a natural one in that some open textbooks found online often have not undergone structured peer review or professional editing, which are hallmarks of commercial textbooks. However, several approaches have been developed to assure quality and address the perception among some faculty that open textbooks are inferior to commercial textbooks.

Ensure Faculty Awareness of Quality Review

The most accepted quality endorsement is obtained through the peer review process. Multiple approaches have been tried to encourage faculty participation in the review process. One approach is to solicit unremunerated reviews from faculty who might be interested in using or have used the textbook in their classes. Another approach is to pay qualified faculty to conduct a structured review of an open textbook, as OGT+ has done in some cases. Several faculty reported in a focus group conducted for the current FIPSE grant project (Daytona State College, August 24, 2010) that peer review of an open textbook would be an important factor in their decision to adopt a text. They would be reluctant to select an open textbook if it had not been reviewed, and reviews help them determine if a text is appropriate for their course. A different approach to reviewing is to engage qualified students to review the text. In any case, reviews have the potential to assert the academic quality of texts and to alleviate some faculty concerns about quality.

Another feature of open textbooks that can alleviate quality concerns, when the license permits it, is the freedom to revise and remix materials to suit the learning outcomes of the course. Given the permission to revise and remix, faculty can use multiple sources and choose the parts of each that best meet their objectives and complement their instructional approaches. Depending on the license, faculty can edit the text word by word and correct faults in the text while creating improved versions for future use.

Repository

Respondents to the Florida Open Access Textbook Task Force Survey (OATFF, 2010) ranked *time to find, review, and select* second from among ten factors influencing their decision to use open access materials. Open textbooks are scattered across the Web, making retrieval difficult and time-consuming for individual faculty. Moreover, reviewing a text to determine if it meets a set of prescribed criteria is a very time-consuming task. A faculty participant in a focus group (Daytona State College, August 24, 2010) reported spending several hours on several different occasions searching for materials that were appropriate for his class. Some of the best materials were found by his students. Another participant in the same focus group said, “I think something that would really help for me is to have student reviews ... because something that looks good for me may not be good for the students.”

Fortunately, repositories, university presses, student organizations and consortia can address both of these problems by contributing employee time and contracting with qualified reviewers. For example, one full-time and one part-time employee of the [Florida Distance Learning Consortium \(FDLC\)](#) spend some of their time searching the Web for open textbooks to include in [The Orange Grove Repository](#) and for possible inclusion in the [Orange Grove Text Plus \(OGT+\)](#) collection. In partnership with FDLC, the [University Press of Florida \(UPF\)](#) contracts with qualified reviewers to conduct structured reviews of open textbooks being considered for inclusion.

As part of the deliverables for the Open Textbook Implementation Model, all existing open textbooks that have been discovered and any that have been created will be available for online access through [The Orange Grove Repository](#). This content will consolidate the growing body of open textbooks, and reduce the challenge of finding new or existing ones.

Given the growing body of free and low-cost textbooks, the repository component of this model will help to resolve the current challenge of finding new open textbooks. By using a digital repository as a clearinghouse FDLC will integrate resources from existing repositories and websites into The Orange Grove, as well as incorporate new faculty-contributed textbooks. For a comprehensive account of Florida’s initiative to create and sustain a statewide standards-based educational repository, visit the [Online Content Repository \(OnCoRe\) Blueprint](#).

Training Faculty

Of the respondents to the Florida Open Access Textbook Task Force Survey (OATFF, 2010), 52 percent answered that they were not at all familiar with open access textbooks, 40 percent somewhat familiar, and only seven percent declared that they were very familiar. Because of the early stage of the open textbook innovation, awareness can be expected to increase through normal communication channels. However, FDLC and other organizations seek to accelerate communications through presentations about the open access movement at faculty and administrative meetings and webinars that we host featuring publishers, editors, authors, and adopters of open textbooks, as well as researchers and evaluators of open textbook and open educational resources. It could be argued that the surveys we have administered to thousands of Florida faculty and administrators and thousands of Florida students have increased awareness of open textbooks by stimulating curiosity, even though that was not the intent of the survey.

Faculty champions such as the [Orange Grove Scholars](#) are essential to the maintenance and growth of an open textbook initiative. They grasp the same policy issues as their peers and communicate in familiar terms. Their availability to answer questions and provide encouragement is a powerful inducement toward adoption.

Utilizing Marketing Strategies

The Open Access Textbook Project utilizes [webinars](#), [Facebook](#) and [Twitter](#) sites, [websites](#), and presentations to increase awareness and encourage adoption of open textbooks. Eight webinars during the fall semester of 2010 alone included presentations by open textbook authors, editors, publishers, an ancillary developer, a researcher, and an evaluator.

Sustaining a Reliable Revenue Stream

A reliable revenue stream is needed to invest in reviewing, marketing, possibly developing open textbooks, and to conduct/create any training needed to customize open textbooks. The non-profit organizations that takes on the responsibilities of continuing the processes and maintaining the systems of the publisher, the repository, and the printing function incur ongoing costs, including servers and other hardware, Internet access fees, repository software and associated maintenance fees, costs to place the texts on a print-on-demand server, cost of ISBNs, payments to reviewers, training, marketing and communication costs, and personnel to manage and maintain the systems.

The generation of a reliable revenue stream presents a considerable challenge when the product is available for download free of charge. Current funding approaches rely on revenues generated from students who purchase a print copy of a textbook, endowments, grant funds, donations, and philanthropists. For an overview of various open text resources, their features, and their operational and financial models, see [Appendix M](#). Other potential sources could include student fees for courses in which open textbooks are used, fees paid by institutions, state funding, and support from student government associations and grant donors.

Potential Funding Sources

Sale of Print Books and Ancillaries

Several organizations support the editorial, reviewing, and myriad other costs of making open textbooks available by adding an extra charge onto the costs of on-demand printing, audio versions, ancillaries such as digital flash cards and study guides, teaching materials, and shipping.

Advertising

One company, [Textbook Media](#), offers textbooks with “ads placed in natural breaks in the subject matter” and with limited printing ability without charge or for a low charge. Students who prefer an “ad-free” version pay a higher price (Textbook Media, 2009) for a downloadable or printed version.

Federal Grant Funding

Federal legislation has been introduced that would make funds available for developing open textbooks. Senator Durbin introduced S.1714, Open College Textbook Act of 2009, on September 24, 2009. The bill has been read twice and referred to the Committee on Health, Education, Labor, and Pensions. A companion House bill, H.R. 4575, Open College Textbook Act of 2010, was introduced by Representative Wu on February 23, 2010. These bills would substantially help to increase the number of open textbooks available and would include “a nonprofit or for-profit organization that produces open textbooks” eligible for funding (Sec. 4(b)(3)) as well as institutions and professors, but the funds would be available for only one year (Sec. 4 (c)).

State Funding

The 2010 Florida legislature authorized the Florida Distance Learning Consortium to “Develop, in consultation with the Florida College System and the State University System, a plan for promoting and

increasing the use of open access textbooks as a method for reducing textbook costs” (F.S.1004.091(2)(d)2.), but to date has not made funds available for implementing such a plan.

Philanthropic Funding

Several organizations dedicated to the production and distribution have received funds from philanthropic organizations. For example, Rice University’s Connexions is supported by The William and Flora Hewlett Foundation and The Maxfield Foundation, as well as by private individuals (<http://cnx.org/aboutus/people/sponsors>). In another example, the Bill & Melinda Gates Foundation matched the Washington state legislature’s support of the Open Course Library with a \$750,000 contribution. If positive returns on these investments accrue as expected, more philanthropic funding can be expected.

Institutions Pay a Fee

In principle, public postsecondary institutions associated with an organization like the partnership of Florida Distance Learning Consortium and University Press of Florida, which produces the OGT+ open textbooks, could be supported by a minimal fee paid by each institution that used open textbooks from that source.

Student Fee (by Course) When an Open Textbook is Used

As another model, minimal student fees could be assessed when an instructor adopts an open textbook for a course that is available through a collaborative such as OGT+. The Florida Student Textbook Survey of over 13,500 students showed strong support for such a fee (between \$5 and \$10) to maintain the currency and also develop new textbooks for use by students. In lieu of paying for a textbook, students would pay a relatively small materials and supplies fee, similar to a lab fee for a course, which would entitle them to access the text online or download a PDF version.

Donations Made from a Website

Some organizations solicit donations as a supplementary funding source such as Massachusetts Institute of Technology’s [OpenCourseware initiative](#) and the [Public Knowledge Project](#), a partnership involving Simon Frasier University in Canada and Stanford University in the U.S.

Student Government

If students were sufficiently aware of the potential savings to them from open textbooks, they might be motivated to raise funds to support the production of them. The [Student Public Interest Research Groups \(PIRGs\)](#) have been ardent supporters of open textbooks for several years.

University Press Economics

University presses face great challenges in making the publishing of open access textbooks financially viable. As Sanford G. Thatcher, retired Director of [Penn State University Press](#), said in a session of the [2010 University of North Texas Open Access Symposium](#):

On the one hand, and above all, a university press’s mission is defined by the imperative that drives academe as a whole: create new knowledge and communicate it to the next generation of students and scholars. On the other hand, every university press must make enough money to stay viable as a commercial enterprise operating in the same business environment as any other publisher. A few can do so without the help of their parent universities; the vast majority cannot and need to be subsidized at some level (on average, 10% of their operating budget) ([Thatcher, 2010](#), p. 1).

Although the university press's aim of providing academia with knowledge is consistent with the open access that many would like to provide, thus far government agencies have been unwilling, and universities in the U.S. have been unable, to support them sufficiently to cover the costs of making open access texts available. Thus, Thatcher (2010) laments:

In principle, open access is a good thing: every press would love to be supported in such a way as to feel no need to grovel in the marketplace for every last penny but instead be liberated to share the wealth of knowledge we produce in our books and journals with the entire world at no cost to the end-user. In practice, no university in the U.S. yet has shown any inclination to provide the level of support to make that laudable goal feasible economically (p. 3).

However, as Thatcher points out, university presses in Canada and Europe have received such support, and, as he failed to note, [University Press of Florida](#) has adopted a model of offering downloads of open textbooks free to the entire world while subsidizing the associated expenses with print-on-demand revenue. [Athabasca University Press](#) in Alberta, Canada is "dedicated to the dissemination of knowledge and research through open access digital journals and monographs, as well as through new electronic media" (Athabasca University Press, 2008). It sells printed bound versions of its books as well. The [Open Access Publishing in European Networks](#) (OAPEN, 2011) works on a different model, charging authors a fee starting at around €700 for distributing electronic versions of their works openly. Both of these presses provide the peer reviews, copy editing, and other services that sets the price of open access for American university press texts beyond that provided by their universities. As Thatcher (2010) puts it:

Thus presses are left to fend for themselves, with about one-tenth of their costs covered, and must look to every source of revenue they can find, including from e-reserves and course-management systems where journal articles and book chapters are reproduced in great quantities, to remain in business (p. 3).

In each of these financial models at least two shortcomings are relevant: (a) funding is disproportionately obtained from a particular source, and (b) an element of uncertainty exists as to the model's sustainability. As examples of the former shortcoming, OAPEN charges a fee to the author, the very benefactor who contributes his or her intellectual property to the world, while the beneficiaries of the gift pay nothing for the downloaded work. In the University Press of Florida model, print-on-demand purchasers pay not only for the printing expenses, but they also subsidize the developmental editing, copy editing, and other associated expenses for the free downloads. These inequities in funding sources must either be tolerated or modified.

Regarding the latter shortcoming, the uncertainty about sustainability of the model, the survival of the enterprise depends on the robustness and the flexibility of the financial model. Those models that draw fees from the author might have to compete with enterprises that charge no such fees. Those that subsidize costs associated with producing books downloaded for free with revenue from print-on-demand books might have to face the eventuality of insufficient sales of print-on-demand books. Perhaps all business models have some elements of uncertainty. So the viability of the financial model might pivot on having multiple sources of revenue to draw from and the flexibility to adjust the proportions those sources contribute to the changes in the marketplace.

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Appendices

Appendix A

Open Textbook Definitions

Varied Characterizations of Open Textbooks

Definition or Description	Source
<p>An open textbook is an openly-licensed textbook offered online by its author(s). The open license sets open textbooks apart from traditional textbooks by allowing users to read online, download, or print the book at no additional cost.</p>	<p>Wikipedia en.wikipedia.org/wiki/Open_textbook</p>
<p>For a textbook to be considered open, it must be licensed in a way that grants a baseline set of rights to users that are less restrictive than its standard copyright.^{[6][7]} A license or list of permissions must be clearly stated by the author.^[8]</p> <p>Generally, the minimum baseline rights allow users at least the following:</p> <ul style="list-style-type: none"> ▪ to use the textbook without compensating the author ▪ to copy the textbook, with appropriate credit to the author ▪ to distribute the textbook non-commercially ▪ to shift the textbook into another format (such as digital or print) <p>Many authors also grant rights such as:</p> <ul style="list-style-type: none"> ▪ to add, remove or alter content in the textbook, often on the condition that derivative works must have the same license ▪ to copy and distribute the textbook without giving credit to the author ▪ to use the textbook commercially 	<p>Wikipedia en.wikipedia.org/wiki/Open_textbook#Definition</p>
<p>complete digital textbooks that are accessible online at no cost, and they are affordable to purchase printed as a book</p>	<p>Student Public Interest Research Groups (Student PIRGs) www.studentpirgs.org/textbooks/documents/s10-prof-emails.doc</p>
<p>Open textbooks are high-quality college texts offered online under a license that allows free digital access and low-cost print options</p>	<p>Student Public Interest Research Groups (Student PIRGs) http://www.studentpirgs.org/open-textbooks</p>
<p>An emerging development in OER is open textbooks, which are textbooks that are freely available with nonrestrictive licenses. Covering a wide range of disciplines, open textbooks are available to download and print in various file formats from several web sites and OER repositories. Open textbooks can range from public domain books to existing textbooks to textbooks created specifically for OER.</p>	<p>Connexions http://cnx.org/content/m15226/latest/</p> <p>also OER Commons http://wiki.oercommons.org/mediawiki/index.php/What_are_Open_Textbooks%3F</p>

<p>Open textbooks are free online textbooks that are available for download. In addition, users may choose to customize and to print any part of the online text. In this way, professors can make changes to the content in order to better suit their personal teaching styles. Depending upon the preferences of the original author of the material, it may even be possible to request professionally bound printed copies of the content for just \$10 to \$20.</p>	<p>Top Colleges http://www.top-colleges.com/blog/2010/04/25/open-textbooks-offer-money-saving-opportunities-to-college-students/</p>
<p>Already, more than 1,300 professors across the country are using open textbooks - which are free online, affordable in print and openly licensed – saving students 80% on average according to the new report (A Cover to Cover Solution, Student PIRGs).</p>	<p>Cable Green's Blog http://blog.oer.sbctc.edu/2010/10/how-open-textbooks-are-path-to-textbook.html</p>
<p>Open textbooks are typically authored by faculty and published on the web with the support of universities or new commercial companies. This new business model enables free online access to textbooks. Open textbooks are usually governed by Creative Commons licenses that enable users to download, customize or print the textbook without expressed written consent of the author.</p>	<p>California State University, Affordable Learning Solutions http://als.csuprojects.org/free-textbooks</p>
<p>...textbooks that are made freely available by their authors and can be chopped up and manipulated by professors who use them.</p>	<p>Inside Higher Ed http://www.insidehighered.com/news/2010/10/01/textbooks</p>
<p>Unlike commercial e-books, open textbooks are accessible online at no cost, very affordable as a print book, and are licensed to allow faculty to legally access and reformat copies of the text at no additional cost.</p>	<p>College Open Textbooks Ning http://collegeopentextbooks.ning.com/profiles/blogs/how-revolutionary-are-open</p>
<p>Open textbooks are a long-term solution, because they offer a range of affordable options including print copies, PDFs and free web-based versions that can reduce costs for all students. (from the Cover to Cover Solution Abstract, Student PIRGs)</p>	<p>Educause http://www.educause.edu/Resources/ACovertocoverSolutionHowOpenTe/214612</p>
<p>Open textbooks are often written collaboratively and always give students legal permission to use the material at no cost.</p>	<p>Jamie's Distance Learning Blog http://distancelearn.about.com/b/2009/01/07/where-to-find-open-textbooks-for-free.htm</p>
<p>Open textbooks are available for free online under an open-source license, which allows professors to customize the text. Students who would like a hard copy of a book can choose from a variety of lower-cost printing options.</p>	<p>NewsOK http://newsok.com/open-textbooks-offer-affordable-alternative-student-interest-group-says/article/3502887#ixzz1CotN73kZ</p>

Appendix B

Community College Open Textbook Collaborative Training

TRAINING OVERVIEW

Train-the-Trainer Workshops for Campus Advocate/Trainers Una Daly and David Coal

The Collaborative created and delivered six-hour workshops for Community College Advocate/Trainers. These workshops were delivered face-to-face in multiple cities and in two online formats. “How to Adopt an Open Textbook” is a three-hour workshop-within-a-workshop in these training sessions. About two-thirds of the participants attended primarily for this smaller workshop. The Advocate/Trainers participate in the other three hours designed to teach them to advocate for open textbooks and deliver adoption workshops on their campuses. Both Advocate/Trainers and Collaborative staff delivered one-to-three-hour adoption workshops in face-to-face and online formats.

Depth of Participation

Both in the Collaborative workshops and in the on-campus advocacy and workshops, depth of participation was surprisingly high. Participants included faculty, academic managers, distance learning staff, librarians, bookstore managers, administrators, and more. Many Advocate/Trainers exceeded the advocacy tasks required for the stipend. Some took the initiative to present at conferences and state meetings. These are examples:

- St. Petersburg Community College Sociology Professor Lisa McDonnell presented her adoption story at a Collaborative workshop at her college, on a national live online workshop, and in a videotaped testimonial available to all: http://collegeopentextbooks.org/images/Lisa_McDonnell.wmv
- Central Florida Physics Professor Erik Christensen adopted an open physics textbook because traditional textbooks did not use enough calculus. Erik shared his story at the Orlando workshop and on video now available on YouTube. He created a three-fold flier for his workshop that is now in use nationwide. Erik traveled to Colorado and presented open textbooks to 100 college and high school physics instructors.
- College of the Redwoods Instructional Design Director Geoff Cain invited participants from another northern California college to his workshop on his college campus. He also provided a studio-recorded workshop “Open Textbooks – Open Doors” available to all at <http://tinyurl.com/2d4bo8e>
- Renee Lightner of the Florida State College at Jacksonville computer science division gave a presentation for the student government on the Kent campus.

- To foster support from Central Florida Community College deans and managers, Instructional Systems Designer Chuckie Delano asked to be added to the Learning Management Team's agenda. He used the time to inform them of how to use an Open Textbook in a course.
- Ken Ronkowitz, Passaic County Community College Writing Initiative Director, gave an open textbook presentation for the NJEDge.Net's Educational Activities Task Force. He made the [slides](#) publicly available. Ken plans to present at the Two Year College Association Conference in Washington in November.
- Onondoga Community College faculty passed this [resolution](#) on textbook affordability. Advocate/trainer Sheila Scilia will make the faculty aware that open textbooks are another resource for this initiative.

Train-the-Trainer Workshops

Twelve train-the-trainer workshops occurred in the first year of the Collaborative in cities throughout the United States. Two of the workshops were online. More than 250 community college faculty, bookstore managers, administrators, and other staff members participated. Foothill College, Florida Distance Learning Consortium, Houston Community College, Words & Numbers, Walla Walla Community College, North Seattle Community College, and Spokane Community College contributed instructors.

Advocacy and Workshops by Community College Faculty and Staff

Of the 254 participants in the workshops, more than 60 have agreed to become Advocate/Trainers. Their tasks include promoting open textbooks on their campuses, urging their colleges to join CCCOER, and providing adoptions workshops on their campuses. Due to these efforts, several colleges have joined the consortium. In the first year of the Collaborative, 42 adoption workshops were provided by the following 35 Advocate/Trainers:

Delynda	Keefe	Saint Petersburg College
Sunita	Kumari	Saint Petersburg College
Kate	LeGrand	Broward College
Carol	Weideman	St. Petersburg College
Celeste	Fenton	Hillsborough Community College

Lisa	McDonnell	Online workshop
Kimberly	Batty-Herbert	South Florida Community College South Florida Community College, Avon Park Campus
Erik	Christensen	
Jami	Reed	South Florida Community College
Ron	Cooper	Central Florida Community College
Chuckie	Delano	Central Florida Community College Hillsborough Community College Ybor Campus
Bonnie	Ronson	Houston Community College, Central Campus
Kenneth	Busbee	Florida State College at Jacksonville, Kent Campus
Renee	Lightner	
Colleen	Fawcett	Palm Beach State College Hillsborough Community College Ybor Campus
Richard	Gaspar	
Sonia	Nieves	Broward College in Fort Lauderdale, FL
Dominique	Charlotteaux	Broward College in Fort Lauderdale, FL
Judith	Gaspar	Hillsborough Community College
Zoe	Salloom	Kentucky Community Colleges West Ky Community and Technical College
Faith	Crim	
Cheryl	Sandoe	Pasco-Hernando Community College
Ted	Wilson	Hopkinsville Community College
Chris	Woodall	Madisonville Community College Maysville Community & Technical College
Kimberly	DeVaughn	
Geoff	Cain	College of the Redwoods
Pam	Bridgman	Somerset Community College
Kate	Hess	Kirkwood Community College
Jo-Ann	Halloran	Daytona State College
Claudiarose (Pheo)	Martin	Everett Community College
Lorah	Gough	Houston Community College
Claver	Hategekimana	Wenatchee Valley College, Omak campus
Angela	Secret	Houston Community College
Sue	Gallaway	Centralia College
Stephanie	Delaney	Cascadia College

Appendix C

Florida State University Student
Government Association Resolution



THE FLORIDA STATE UNIVERSITY
STUDENT GOVERNMENT ASSOCIATION

THE SIXTY THIRD STUDENT SENATE

Resolution 11

Sponsored by: Senator Drake

- WHEREAS:** The cost of college textbooks has become a major affordability issue for low and middle income students, adding to the potential that these students will either drop out, take on additional loan debt to pay for textbooks, or undercut their own learning by forgoing the purchase of textbooks, and
- WHEREAS:** Textbook publishers have not responded adequately to these concerns, but have continued to exacerbate this problem by raising prices and employing practices such as unnecessarily issuing new editions of textbooks, and
- WHEREAS:** Faculty and students both share a concern about textbook affordability and its impact on student success, and
- WHEREAS:** Open Textbooks and other open educational resources present an affordable, comparable, and flexible alternative to expensive course materials, and
- WHEREAS:** Open Textbooks are available online at no cost to students, and they can be printed for a low cost in various formats, which ensures that all students have equal access to the content, while still preserving the option to use a conventional textbook format, and
- WHEREAS:** Open Textbooks that are of comparable quality to commercial textbooks that are already available. An example of an open textbook is Caltech Professor R. Preston McAfee's Introduction to Economic Analysis, which has been adopted at NYU and Harvard, and
- WHEREAS:** Open Textbooks are flexible; Instructors are free to use a particular edition indefinitely or customize content if desired, therefore

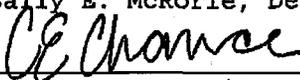
BE IT RESOLVED BY THE SIXTY-THIRD STUDENT SENATE AT THE FLORIDA STATE UNIVERSITY THAT:

We must address the problem of expensive textbooks without undermining the academic freedom of faculty to choose course content. We affirm that it is our duty and responsibility to help establish a program to seek affordable and accessible course materials for the students of The Florida State University whenever possible. We declare our intent to assist the FSU faculty to seek and consider open textbooks and other open educational resources when choosing course materials. We declare our desire to give preference to a low or no cost educational resource such as an open textbook over an expensive, traditional textbook if it best fits the needs of a class. We encourage institutions to develop support for the use of open textbooks and other open educational resources.

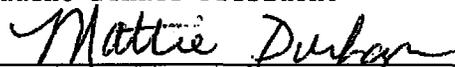
BE IT FURTHER RESOLVED THAT:

A copy of this resolution is sent to the following:

Dustin Daniels, Student Body President
Dr. Eric J. Barron, President of Florida State University
Joseph Travis, Dean of the College of Arts and Sciences
Caryn L. Beck-Dudley, Dean of the College of Business
Lawrence C. Dennis, Dean of the College of Communication & Information
Thomas Blomberg, Dean of the College of Criminology and Criminal Justice
Dr. Marcy P. Driscoll, Dean of the College of Education
Ching-Jen Chen, Dean of the College of Engineering
Frank Patterson, Dean of the College of Motion Picture Arts
Billie J. Collier, Dean of the College of Human Sciences
Donald J. Weidner, Dean of the College of Law
Dean Fogarty, Dean of the College of Medicine
Don Gibson, Dean of the College of Music
Lisa Ann Plowfield, Dean of the College of Nursing
David W. Rasmussen, Dean of the College of Social Sciences & Public Policy
Nicholas F. Mazza, Dean of the College of Social Work
Dr. Sally E. McRorie, Dean of the College of Visual Arts, Theatre and Dance



Student Senate President



Student Senate Program Assistant

PASSED: 10th of November, 2010

Appendix D

Florida Distance Learning Consortium-
University Press of Florida
Memorandum of Understanding (MOU)



Discover the World with Florida Books

UNIVERSITY PRESS OF FLORIDA

15 NW 15th Street
Gainesville, FL 32611-2079
(352) 392-1351, fax (352) 392-0590
www.upf.com
Equal Opportunity Institution

Memorandum of Understanding

The Florida Distance Learning Consortium (FDLC) and the University Press of Florida (UPF), parties to this agreement, will adhere to the following guidelines for the implementation of a formal Orange Grove Texts *Plus* (OGT+) liaison position staffed at UPF. OGT+ is collaboration between The Orange Grove Digital Repository (OGR), a unit of the statutorily-established FDLC and UPF, which is hosted by the University of Florida (UF).

1. The FDLC will provide at least \$1750 (but no more than \$2500) quarterly for eight (8) hours of the OGT+ liaison's time each week—limited to 300 hours annually—to conduct research on open access textbooks that will contribute to the development of the open textbook web site, resources, and plan. The liaison will also be able to search for and add open textbooks to OGR, recommend books for inclusion in the OGT+ program, and act as a consultant for OGR staff on related issues. The liaison will serve as the primary point of contact between UPF and FDLC staff and formally document processes and procedures implemented at UPF to support OGT+. The liaison will provide reports to OGR via bimonthly conference calls and written memoranda, as requested.

2. The parties shall resolve any disputes arising from this agreement in a timely manner by first attempting good faith negotiation, then referring the matter to senior executives of both parties, and then through a mutually-agreeable neutral advisor.

3. All notices, communications, and payments permitted or required under this agreement shall be sent to the following persons at the addresses listed below:

If to UPF:

Name: Meredith Morris-Babb
Title: Director
Address: University Press of Florida
15 NW 15th Street
Gainesville, FL 32611-2079
Phone: 352-392-1351 x204
Fax: 352-392-0590
Email: mb@upf.com

If to FDLC:

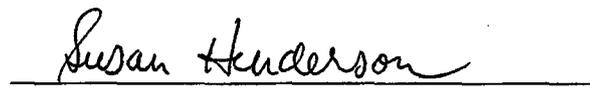
Name: Susan Henderson
Title: Associate Executive Director
Address: Florida Distance Learning Consortium
1753 W. Paul Dirac Drive
Tallahassee, FL 32310
Phone: 850-922-3359
Fax: 850-922-3109
Email: shenderson@distancelearn.org

4. Either party may terminate this agreement upon sixty (60) days prior written notice to the other party. Upon termination, the parties shall account to each other in good faith and settle any outstanding debts and obligations.

UNIVERSITY PRESS OF FLORIDA

FLORIDA DISTANCE LEARNING CONSORTIUM


Meredith Morris-Babb, Director


Susan Henderson, Associate Executive Director

Date: 5 / 24 / 10

Date: 5-25-2010

Appendix E

Open Access Textbooks Task Force Recommendations

Open Access Textbook Task Force (OATTF) Recommendations

February 27, 2010

Listed below are the final task force recommendations to meet critical, identified needs for a successful implementation of open access textbooks in Florida.

Recommendation (1): The OATTF recommends that the Florida Distance Learning Consortium in consultation with the Board of Governors and the Division of Florida Colleges **periodically update** the open access textbook inventory and **annually update** the prioritized list of general education courses recommended for the possible use of open access textbooks. This prioritized list of general education courses should also map available open access textbooks to a specific prioritized course number when that information becomes available. Any course number for which there is an identified open access textbook should also be included in the list which would be available on-line.

Recommendation (2): The OATTF supports the joint legislative budget request by the Division of Florida Colleges and the Board of Governors for equal support the repository software maintenance fee of \$85,000.

Recommendation (3): The OATTF endorses the proposed plan for the review and approval of open access textbooks that has been developed and implemented through the Orange Grove Texts *Plus* initiative based on publisher practices.

Recommendation (4): The OATTF recommends that the Florida Distance Learning Consortium coordinate interested individuals or groups, with approval from the Board of Governors and the Division of Florida Colleges, that will investigate and identify funding sources to **support a competition to develop** open access materials for prioritized Florida courses. This recommendation is not to the exclusion of efforts to seek external support for textbook development and peer review.

Recommendation (5): The OATTF recommends that both the Division of Florida Colleges and the Board of Governors appoint appropriate academic representation to develop and recommend review criteria or guidelines for the inclusion of digital scholarship in tenure and promotion decisions. The Florida Distance Learning Consortium will research and identify similar policies or criteria currently in use or in development.

Recommendation (6): The OATTF recommends that the Florida Distance Learning Consortium develop professional development materials, a media kit and offer an awareness campaign on individual campuses that will raise awareness of and promote the use of open access textbooks and instructional materials. The focus should be to offer a wide selection of teaching resources for selection, modification and/or reuse, while still preserving the principle of academic freedom. Media kits should be sent to local student media sources.

Recommendation (7): The OATTF recommends that faculty be encouraged to contribute a textbook to an institutional or statewide foundation by providing a federal income tax charitable contribution credit. The value of the tax credit would be established by the University Press of Florida.

Recommendation (8): The OATTF recommends that institutional leadership be informed regarding barriers and incentives needed to encourage significant faculty adoption of open textbooks and asked to explore, enhance and report on successful institutional specific incentives that promote digital academic involvement. These incentives should integrate with existing institutional recognition systems to acknowledge digital scholarship.

Recommendation (9): The OATTF recommends that the Florida Distance Learning Consortium request nominations for a statewide committee that will recommend, develop, and establish a statewide recognition system that evaluates such criteria as: high quality contributions of open access textbooks and materials, increased student performance through the use of open access materials, increased student satisfaction, or the decrease in costs for student course materials. Faculty and staff recognized for this honor would be invited to participate in a wide range of roles.

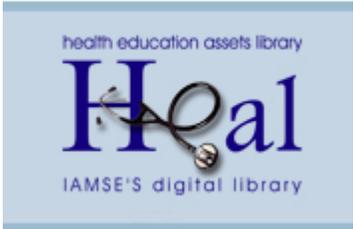
Recommendation (10): The OATTF recommends the continued use of repository software to ensure system protection that makes the rights statement and terms of use clearly visible to the consumer.

Recommendation (11): The OATTF recommends that the Florida Distance Learning Consortium monitor and annually report on the adoption rate of open access textbooks, progress of the initiative, and satisfaction of faculty and students regarding their use of open access textbooks.

Appendix F

Branding Examples

Table 1. Marketing Logos, URLs, Tag Lines, and Descriptions

Logo	Identity	Tagline	Description
	<p>Connexions, Rice University</p> <p>http://cnx.org</p>	<p>cnx.org</p>	<p>“Connections is a place to view and share educational material made of small knowledge chunks called modules that can be organized as courses, books, reports, <i>etc.</i>”</p> <p>“Just as knowledge is interconnected, people don't live in a vacuum. Connexions promotes communication between content creators and provides various means of collaboration. Collaboration helps knowledge grow more quickly, advancing the possibilities for new ideas from which we all benefit.”</p>
	<p>Health Education Assets Library (HEAL)</p> <p>http://www.healcentral.org/</p>	<p>Free, high-quality digital materials for health sciences education.</p>	<p>For more than two years, members of The International Association of Medical Science Educators (IAMSE) and the co-directors of the Health Education Assets Library (HEAL) have been working together to further the development of HEAL. HEAL is a digital repository that allows medical educators to discover, download, and re-use over 22,000 medical education resources.</p> <p>HEAL publishes images, videoclips, animations, presentations, and audio files that support healthcare education. These are typically objects that can be used in a variety of presentations across multiple disciplines. MedEdPortal typically publishes more complete, stand-alone, resources such as tutorials, virtual patients, simulation cases, lab guides, videos, podcasts, and assessment tools.</p>

Logo	Identity	Tagline	Description
	<p>Kentucky Learning Depot</p> <p>http://kylearningdepot.org</p>	<p>Kentucky's P20 Digital Repository</p>	<p>"The Kentucky Learning Depot is Kentucky's P-20 repository for quality digital learning content. This is about educators connecting with content to build a learning community."</p> <p>"The lessons and resources you find here, submitted and reviewed by the community, represent the best educational practices today."</p>
	<p>Multimedia Educational Resource for Learning and Online Teaching (MERLOT)</p> <p>MERLOT is a program of the California State University, in partnership with higher education institutions, professional societies, and industry.</p> <p>http://www.merlot.org</p>	<p>Putting Educational Innovations Into Practice</p>	<p>"MERLOT is a free and open online community of resources designed primarily for faculty, staff and students of higher education from around the world to share their learning materials and pedagogy. MERLOT is a leading edge, user-centered, collection of peer reviewed higher education, online learning materials, catalogued by registered members and a set of faculty development support services.</p> <p>"MERLOT's strategic goal is to improve the effectiveness of teaching and learning by increasing the quantity and quality of peer reviewed online learning materials that can be easily incorporated into faculty designed courses."</p>

Logo	Identity	Tagline	Description
	<p>The National Science Digital Library (NSDL) is the Nation's online library for education and research in Science, Technology, Engineering, and Mathematics.</p> <p>http://nsdl.org/</p>	<p>Explore, share, learn, create</p>	<p>“The broader NSDL community of resource builders and contributors is composed of a diverse range of institutions including universities, museums, libraries, research labs, federal agencies, professional societies, and commercial content providers, many of which have received funding through the NSF NSDL Program.”</p> <p>“NSDL Pathways partners are core partnerships within the National Science Digital Library. Pathways provide stewardship for STEM educational content and services required by broad communities of users. These communities of users are typically audience-specific, either by discipline, education level, or via other designation such as type of resource (e.g., multimedia resources).”</p>
	<p>The North Carolina Learning Object Repository (NCLOR)</p> <p>http://www.explorethelor.org</p>	<p>a new world of learning.</p>	<p>“The North Carolina Learning Object Repository (NCLOR) collects documents, audio/video clips, simulations, learning modules, assessments, and more – virtually any type of learning resource that can be digitized and processed. Teachers from around the state can then search the LOR, find materials appropriate to the classes they are teaching, and use them as is or modify them to suit their needs. This concept of sharing and reusing is the core of the LOR philosophy. Teachers can become more productive and efficient. If quality course or digital materials exist and are free for North Carolina faculty, why reinvent the wheel?”</p>

Logo	Identity	Tagline	Description
	<p>The Orange Grove</p> <p>http://www.theorange Grove.org/OGMain.asp</p>	<p>Florida's Digital Repository</p>	<p>"Welcome! The Orange Grove is an online library of free instructional resources for Florida's educators."</p> <p>"The Orange Grove Digital Repository (OG) is an online, statewide initiative to store and manage Florida's instructional, organizational, and professional development resources for discovery, use and remixing by Florida faculty and administrators. The OG is supported by the Florida Distance Learning Consortium (FDLC). The FDLC is a legislatively funded entity that supports all public (39) post secondary institutions in Florida in their delivery of technology mediated learning through quarterly meetings, web services and resources including an online catalog of distance learning courses at www.distancelearn.org and The Orange Grove Repository."</p>
	<p>Orange Grove Texts <i>Plus</i></p> <p>http://www.theorange Grove.org/OGAbout.asp</p>	<p>Making textbooks accessible, affordable, and adaptable for students.</p>	<p>"The University Press of Florida (UPF) and the Orange Grove Digital Repository (OGR) have formed Orange Grove Texts Plus (OGT+), a collaboration that builds on the strengths of a traditional publisher, a digital repository, and a print-on-demand printer to offer high-quality, affordable, adaptable, and accessible textbooks to faculty and students in an electronic world. Our goals are to:</p> <ol style="list-style-type: none"> 1) reduce the cost of textbooks and related instructional materials for high enrollment general education courses by at least 40%; 2) empower faculty to offer the best possible textbooks and instructional resources for their courses; 3) allow students to interact with their textbooks and instructional resources in the format that they choose: order a print-on-demand textbook in black and white or color, print all or part of the textbook at no cost, download the textbook, and access the textbook online at no cost."

Appendix G

Open Textbooks Brochure
by Erik Christensen

Where to find open textbooks

Orange Grove Text Plus (OGT+) is Florida's operational repository project of open source educational materials.

www.theorangegrove.org/OGTtest.htm

The Assayer is the web's largest catalog of open source textbooks and is a very good place to find free books about math, science, and computers.
<http://theassayer.org/>

CCCOER is a collaborative effort to develop and use open educational resources (OER) in community college courses.
<http://cccoer.wordpress.com/resources/>

Flat World Knowledge, a free, open source textbook publisher.
www.flatworldknowledge.com

Connexions is a Content Commons of free, open-licensed educational materials in fields such as music, electrical engineering and psychology.
<http://cnx.org>

Wikibooks is a Wikimedia community for creating and sharing educational textbooks.
www.wikibooks.org/

Merlot is a free and open resource designed primarily for higher education.
www.merlot.org/

OER Commons is a worldwide learning network of shared teaching and learning materials.
www.oercommons.org/

www.opentextbooks.wetpaint.com

Demystifying Creative Commons



CC-BY

Attribution - This license lets others distribute, remix, tweak, and build upon your work, even commercially, as long as they credit you for the original creation. This is the most accommodating of licenses offered, in terms of what others can do with your works licensed under Attribution.



CC-BY-SA

Attribution Share Alike - This license lets others remix, tweak, and build upon your work even for commercial reasons, as long as they credit you and license their new creations under the identical terms. This license is often compared to open source software licenses. All new works based on yours will carry the same license, so any derivatives will also allow commercial use.



CC-BY-ND

Attribution No Derivatives - This license allows for redistribution, commercial and non-commercial, as long as it is passed along unchanged and in whole, with credit to you.



CC-BY-NC

Attribution Non-Commercial - This license lets others remix, tweak, and build upon your work non-commercially, and although their new works must also acknowledge you and be non-commercial, they don't have to license their derivative works on the same terms.



CC-BY-NC-SA

Attribution Non-Commercial Share Alike
This license lets others remix, tweak, and build upon your work non-commercially, as long as they credit you and license their new creations under the identical terms. Others can download and redistribute your work just like the by-nc-nd license, but they can also translate, make remixes, and produce new stories based on your work. All new work based on yours will carry the same license, so any derivatives will also be non-commercial in nature.



CC-BY-NC-ND

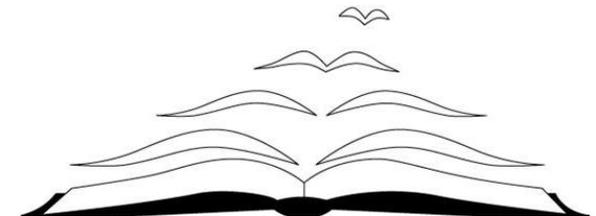
Attribution Non-Commercial No Derivatives
This license is the most restrictive of our six main licenses, allowing redistribution. This license is often called the "free advertising" license because it allows others to download your works and share them with others as long as they mention you and link back to you, but they can't change them in any way or use them commercially.

www.creativecommons.org

Open Textbooks

The Affordable Flexible Alternative

A way to significantly reduce student textbook costs while enabling you the flexibility to reformat and customize your course material.



Open Textbooks

Open textbooks offer an affordable, comparable, and flexible alternative to traditional textbooks.

What is an open textbook?

What makes a textbook open? A textbook becomes "open" when its copyright-holder grants usage rights to the public through an "open license," which typically includes the right to access, reformat, and customize it at no additional cost.

What do open textbooks look like?

Hard copies of open textbooks look much like traditional texts. The primary differences are that open textbooks are also accessible online at no cost and the hard copies are optional and affordably priced.

How many open textbooks are there?

Thousands of open textbooks already exist and more are on the way.

Who pays open textbook authors?

Open publishing models are still evolving, so author payment varies. Some are paid royalties on print sales, some receive grant support, and others choose to write on their own time.

Are open textbooks high quality?

Many open textbooks are developed through traditional peer review, others are vetted by experts. As with any textbook, you are the final judge of whether an open textbook meets the needs of your course.

What do open textbooks look like?

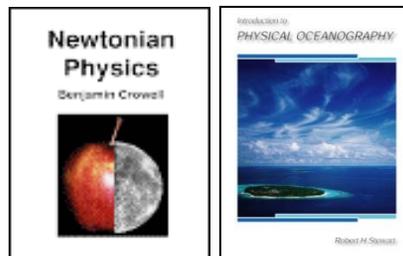
Open textbooks are similar to traditional texts, but much more flexible. If desired, you can create a custom version by editing it yourself to match your classroom instruction.

Open textbooks are available in both print and digital formats:

- Online, at no cost.
- Downloaded PDF, at no cost.
- Print-on-Demand, typically for \$20--40.

Many open textbooks contain a variety of supplemental materials (e.g., test banks, quizzes, PowerPoints, etc.).

Examples
of open
textbooks:



Open Textbook Advocates

CCOTC - Community College Open Textbook Collaborative
www.ccotc.org

CCOER - Community College Consortium for Open Educational Resources
www.ccoer.org

How to adopt an open textbook

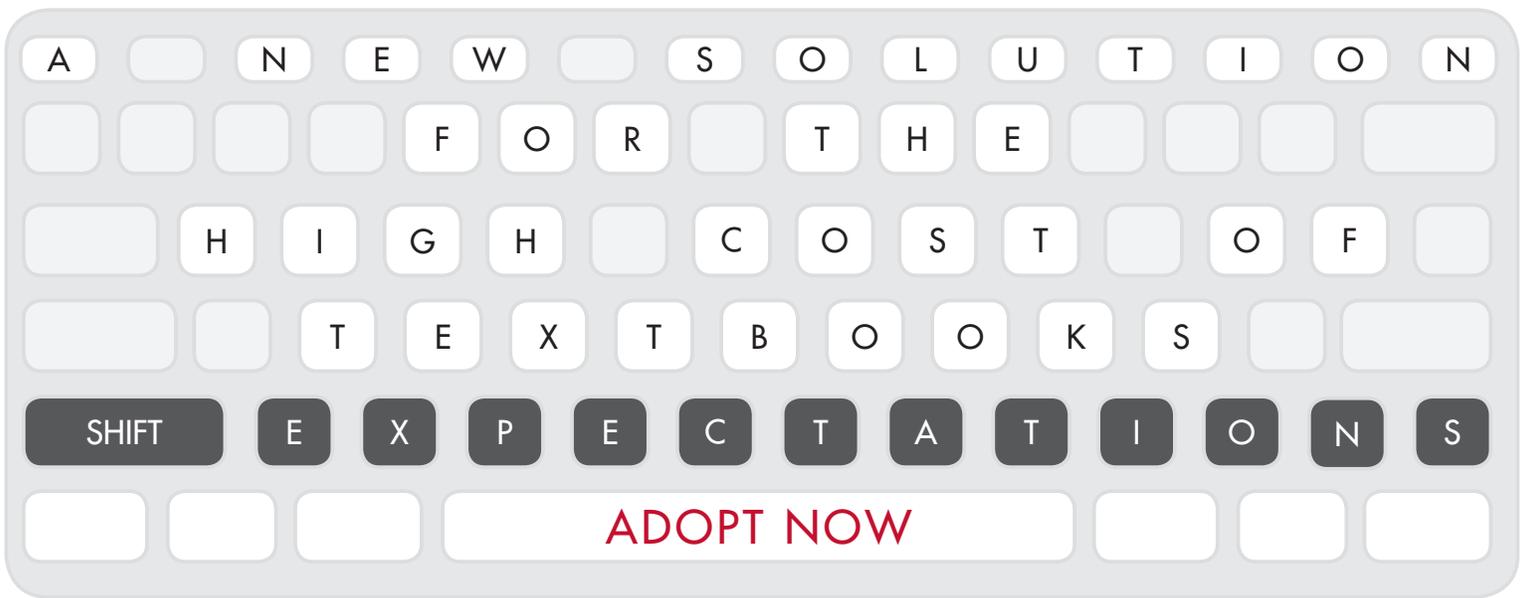
1. **Find the right textbook.** Search the repositories listed in this pamphlet. Use advanced search options to narrow results.
2. **Review and evaluate it** to see if it matches your criteria and based on content, presentation, online accessibility, production options, platform compatibility, delivery options, interactivity, consistency between online and printed versions, and available ancillary material (test banks, PowerPoints, etc.)
3. **Decide if you want to use it as is, or edit it.** One of the benefits of open textbooks is flexibility to modify and customize them for specific course designs as much or as little as you desire. If you want to make edits or append content, make sure the licensing allows that. Different repositories will have different options for editing and publishing revised copies.
4. **Distribute it to your students.** Select the best format to distribute to your class (online, downloadable PDF, Print-on-Demand via either your campus bookstore or from the online repository.)



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Appendix H

Collaborative Statistics Flyer
Orange Grove Texts Plus

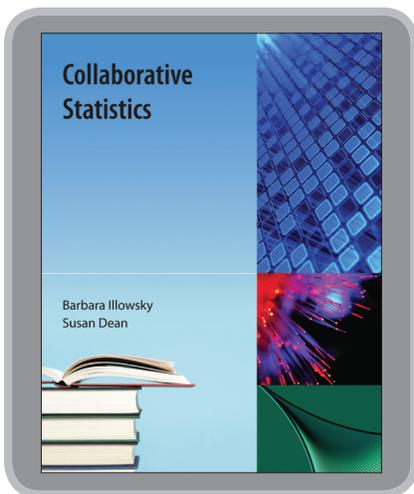


University Press of Florida
University of Florida
15 NW 15th Street
Gainesville, FL 32611-2079

Non-Profit Org.
U. S. Postage
PAID
Jacksonville
Florida
Permit No. 4390



Orange Grove Texts *Plus*
Accessible. Affordable. Adaptable.



Collaborative Statistics

- Open Textbook (free)
- Download Textbook (free)
- Print on My Printer (free)
- Purchase Printed Book (affordable)

For Your Introductory Statistics Courses

Get Info

Finally, an affordable statistics textbook!

"I am very impressed with what Collaborative Statistics offers. It is just as good if not better than some text books that I have seen on the market. I am surprised that it is free."—Abraham K. Biggs, Broward College

Intended as an introductory statistics textbook for college students, **Collaborative Statistics** (ISBN 9781616100193) is constructed on the premise that students learn best by actively participating, rather than by just watching and listening. Developed around the idea that students need to be thoroughly engaged

in the learning process in order to make sense of statistical concepts, this text encourages students to learn while working with their peers.

The book focuses on four main concepts: thinking statistically, incorporating technology, working collaboratively, and writing thoughtfully. Chapters cover sampling and data, descriptive statistics, probability topics, discrete random variables, the normal distribution, the central limit theorem, confidence intervals, hypothesis testing, the chi-square distribution, linear regression and correlation, and F distribution and ANOVA. Intermediate algebra is the only prerequisite.

Group activities and labs are centered on student-friendly problems involving playing cards, dice, textbook prices, and other interesting subjects relevant to today's world. Practice problems provided in every chapter give students the opportunity to immediately apply what they've read.

Collaborative Statistics was developed over several years and has been used in regular and honors-level classroom settings as well as in distance learning classes. It includes full materials for course offerings, including expository text, examples, labs, homework, and projects. An online course designed around this textbook won an award for the best online California community college course.

Collaborative Statistics

Barbara Illowsky
Susan Dean



Now available for adoption via Orange Grove Texts Plus

Collaborative Statistics is an open textbook, which means it is **free to view, download, and print on your personal printer**. For those who would like to own the book, printed and bound copies are also available at the low cost of **\$44.95**. (That's less than half the cost of traditional textbooks!) Don't miss this opportunity to assign your students a book they really can afford.

For more information visit:
www.theorangegrove.org/OGTest.htm

Go online to review the book

http://florida.theorangegrove.org/items/687aa918-8ada-78a1-e889-f532825afd6b/1/?tempwn.b=access%2Fsearch.do%3Fpg.e%3Dtrue%26pg_pp%3D10%26pg_pg%3D1%26hier.topic%3Dd37c6ed5-3822-84a6-721c-6d9033a88541%26qs.tq%3Dcollaborative%2Bstatistics%26qs.q%3Dcollaborative%2Bstatistics%26sort_s%3DRANK%26sh_e_canDisplay%3Dchecked

OR USE THE ABBREVIATED URL:

<http://bit.ly/dor5eg>



What is Orange Grove Texts Plus?

The Orange Grove is an online library of free, high-quality learning resources. Orange Grove Texts Plus (OGT+) is a joint initiative of the University Press of Florida and The Orange Grove. The goal of this partnership is to reduce the cost of books to students by offering texts that are affordable, accessible, and adaptable to instructor preferences.

Orange Grove Texts Plus makes a wide range of textbooks available to students at up to half the cost of traditional textbooks. Ranging in price from \$29.50 to \$54.50, OGT+ textbooks will be a welcome departure from traditional textbooks typically priced at \$100.00 and up. These textbooks are also available online for free, providing students equal access to the content.



Below is a QR code for the webpage for **Collaborative Statistics**. Using any mobile phone or camera-enabled mobile device that has QR code decoding software installed, take a picture of the image below. Your browser will then automatically open and direct itself to the URL listed above!



Appendix I

Creative Commons Attribution Licenses

Creative Commons Attribution Licenses – Page 1 of 6

© 2010 Kenneth Leroy Busbee

Version 2 – Dated: January 30, 2010

Licensed by: Kenneth Leroy Busbee under a

Creative Commons Attribution License (CC-BY 3.0)

<http://creativecommons.org/licenses/by/3.0/>

This item was developed as a portion of a workshop covering open textbook adoption. This handout is part of the workshop that explains the Creative Commons Attribution Licenses and most of the content on pages 2 and 3 are the original creations of the Creative Commons (see links on page 2).

Directions:

1. If possible show the “A Shared Culture” video from the Creative Commons web site.
2. Pass out page 2 of this handout and discuss:
 - a. Copyright laws protect a person’s ability to control and profit from their creations.
 - b. Some authors want to share but with some conditions – thus a license to use.
 - c. Review the 4 conditions.
3. Pass out page 3 of this handout and discuss the 6 licenses.
4. Pass out page 4 of this handout and have the workshop participants find all six licenses.
 - a. First occurrence in sequence of items as on page 3 is: #9, #1, #38, #37, #2 and #6.
5. Pass out page 5 and have them figure out what would be the most likely license each author would use. Each of the 6 licenses is used only once. The answers are:
 - a. CC-BY-NC
 - b. CC-BY-NC-ND
 - c. CC-BY
 - d. CC-BY-SA
 - e. CC-BY-ND
 - f. CC-BY-NC-SA
6. Pass out page 6 and have them figure out which licenses would satisfy an adopter’s requirements. The answers are:
 - a. CC-BY-ND and CC-BY-NC-ND
 - b. CC-BY, CC-BY-SA, CC-BY-NC and CC-BY-NC-SA
 - c. CC-BY and CC-BY-SA
 - d. CC-BY
7. General discussion with questions and answers.
 - a. Pass out page 1 and ask them, “What can you do with these materials?”

Creative Commons Attribution Licenses – Page 2 of 6

<http://creativecommons.org/>

<http://creativecommons.org/about/>

<http://creativecommons.org/videos/>

<http://creativecommons.org/videos/a-shared-culture> Link for “A Shared Culture” video.

<http://creativecommons.org/about/licenses/> Link for content on pages 2 and 3 of this handout.

Authors retain the copyrights to their creations. Those rights include the profits from commercial use and distribution of their creations and the right to deny other to make modifications to their creations. However, some creators are willing to share some of their rights with others. This is done when they license others to use their creative material within a set of conditions.

The conditions are:



Attribution
by

You let others copy, distribute, display, and perform your copyrighted work — and derivative works based upon it — but only if they give credit the way you request.



Share Alike
sa

You allow others to distribute derivative works only under a license identical to the license that governs your work.



Non-Commercial
nc

You let others copy, distribute, display, and perform your work — and derivative works based upon it — but for non-commercial purposes only.



No Derivative Works
nd

You let others copy, distribute, display, and perform only verbatim copies of your work, not derivative works based upon it.

By putting various conditions together; there are 6 basic licenses possible:



Attribution **cc by**

This license lets others distribute, remix, tweak, and build upon your work, even commercially, as long as they credit you for the original creation. This is the most accommodating of licenses offered, in terms of what others can do with your works licensed under Attribution.



Attribution Share Alike **cc by-sa**

This license lets others remix, tweak, and build upon your work even for commercial reasons, as long as they credit you and license their new creations under the identical terms. This license is often compared to open source software licenses. All new works based on yours will carry the same license, so any derivatives will also allow commercial use.



Attribution No Derivatives **cc by-nd**

This license allows for redistribution, commercial and non-commercial, as long as it is passed along unchanged and in whole, with credit to you.



Attribution Non-Commercial **cc by-nc**

This license lets others remix, tweak, and build upon your work non-commercially, and although their new works must also acknowledge you and be non-commercial, they don't have to license their derivative works on the same terms.



Attribution Non-Commercial Share Alike **cc by-nc-sa**

This license lets others remix, tweak, and build upon your work non-commercially, as long as they credit you and license their new creations under the identical terms. Others can download and redistribute your work just like the by-nc-nd license, but they can also translate, make remixes, and produce new stories based on your work. All new work based on yours will carry the same license, so any derivatives will also be non-commercial in nature.



Attribution Non-Commercial No Derivatives **cc by-nc-nd**

This license is the most restrictive of our six main licenses, allowing redistribution. This license is often called the “free advertising” license because it allows others to download your works and share them with others as long as they mention you and link back to you, but they can't change them in any way or use them commercially.

Creative Commons Attribution Licenses – Page 4 of 6

Community College Open Textbook Collaborative – CCOTC – Portion of Computer Science

- 1) Cascading Style Sheets (CC-BY-SA)
- 2) CGI Programming on the World Wide Web (CC-BY-NC-SA)
- 3) Complete Guide to Google Wave (CC-BY-SA)
- 4) A Conceptual Guide to NeoOffice 2 for Mac OS X (CC-BY-SA)
- 5) Database Development Lifecycle (CC-BY-NC-SA)
- 6) A Designer's Log: Case Studies in Instructional Design (CC-BY-NC-ND)
- 7) Digital Darkroom Fundamentals for Mac OS X (CC-BY-SA)
- 8) Designing the User Interface (CC- BY-NC-SA)
- 9) Distributed Systems (CC-BY)
- 10) Electronic Commerce: The Strategic Perspective (CC-BY)
- 11) Finding Information in Information Technology and Computing (CC-BY-NC-SA)
- 12) Firefox Manual (CC-BY-SA)
- 13) Flash Tutorials (CC-BY-NC-SA)
- 14) The Future of the Internet and How to Stop It (CC-BY-NC-SA)
- 15) Information on the Web (CC-BY-NC-SA)
- 16) Interpreting Information Systems in Organizations (CC-BY)
- 17) Introducing ICT Systems (CC-BY-NC-SA)
- 18) Introduction to Computer Science (CC-BY-SA)
- 19) An introduction to Data and Information (CC-BY-NC-SA)
- 20) Introduction to Databases and MySQL (CC-BY)
- 21) Introduction to Digital Logic with Laboratory Exercises (CC-BY)
- 22) Introduction to SCORM (CC-BY-NC-SA)
- 23) LaTeX (CC-BY-SA)
- 24) Learning 2.0 for Associations (CC-BY-NC-SA)
- 25) Linux for IT Managers (CC-BY-SA)
- 26) Network Security (CC-BY-NC-SA)
- 27) Non-Programmer's Tutorial for Python 2.0 (CC-BY-SA)
- 28) Operating Systems for Single-Threaded Computers (CC-BY-SA)
- 29) Principles of Object-Oriented Programming (CC-BY)
- 30) Producing Open Source Software (CC-BY-SA)
- 31) Programming Fundamentals – A Modular Structured Approach using C++ (CC-BY)
- 32) Programming in C (CC-BY-NC-SA)
- 33) Programming Languages (CC-BY)
- 34) Programming Languages: Application and Interpretation (CC-NC-BY-SA)
- 35) Programming Using Java (CC-BY-SA)
- 36) Representing and Manipulating Data in Computers (CC-BY-NC-SA)
- 37) Structure and Interpretation of Computer Programs (CC-BY-NC)
- 38) Student Tools (CC-BY-ND)
- 39) Successful Project Management (CC-BY-SA-NC)
- 40) Understanding Open Source and Free Software Licensing (CC-BY-ND)
- 41) Using Excel 2002 (CC-BY-NC-ND)
- 42) Web Security (CC-BY)
- 43) What is a Wiki? (CC-BY-SA)
- 44) XML – Managing Data Exchange (CC-BY-SA)

Creative Commons Attribution Licenses – Page 5 of 6

Figure out what would be the most likely license each author would use?

Place a two letter item in a blank space. Some items will not use all four spaces.

I don't care if other people change my stuff, just give me credit. But I don't want others making a stinking dime off what I did for ever. Not even off of items modified by them.

____ - ____ - ____ - ____

I want control. You may use it and must make others aware of my efforts; but you can't make money on it and you can't change it.

____ - ____ - ____ - ____

I don't care how people use stuff I create. I am willing to openly share, but I want everyone to know that I was the author/creator of the original work.

____ - ____ - ____ - ____

I am letting others use my material without any restrictions. They must offer the same deal on any modifications they make available to others and give me credit for my efforts.

____ - ____ - ____ - ____

I want credit as the creator and don't want it changed. I don't care if others try to make money off of it.

____ - ____ - ____ - ____

I don't care if other people change my stuff, just give me credit. But I don't want others making a stinking dime off what I did for ever. Not even off of items modified by them. Plus they must let other modify their derivative efforts.

____ - ____ - ____ - ____

Creative Commons Attribution Licenses – Page 6 of 6

Different adopters will desire to use materials in different ways.

Identify which licenses will satisfy each of the following adopters.

Place a two letter item in a blank space. Some items will not use all four spaces.

I don't mind if I am restricted from commercial endeavors. I don't want to have others pressuring me into changing another author's works.

____ - ____ - ____ - ____

____ - ____ - ____ - ____

I like being able to change the original author's works to suit my needs. Other restrictions don't bother me.

____ - ____ - ____ - ____

____ - ____ - ____ - ____

____ - ____ - ____ - ____

____ - ____ - ____ - ____

I like being able to change the original author's works to suit my needs. I don't want any commercial use restrictions.

____ - ____ - ____ - ____

____ - ____ - ____ - ____

I want the greatest flexibility in using another author's materials.

____ - ____ - ____ - ____

Appendix J

APA Journal LyX Example

The Title of a Manuscript

John C. Doe
Department of Psychology
Caledonia State University

This is the abstract of the article. This is the abstract of the article.

The article starts here. This is the paragraph that explains the background and poses the research question. The article starts here. This is the paragraph that explains the background and poses the research question. The article starts here. This is the paragraph that explains the background and poses the research question. The article starts here. This is the paragraph that explains the background and poses the research question. The article starts here. This is the paragraph that explains the background and poses the research question.

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Method

This paragraph describes the environment in which participants undertook the treatment. This paragraph describes the environment in which participants undertook the treatment. This paragraph describes the environment in which participants undertook the treatment.

Participants

This paragraph tells how many participants were involved, what their pertinent demographics were, and how many were in each group. This paragraph tells how many participants were involved, what their pertinent demographics were, and how many were in each group. This paragraph tells how many participants were involved, what their pertinent demographics were, and how many were in each group.

Procedure

This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups. This paragraph explains what the researchers did to the participants in the experimental and control groups.

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This paragraph explains what the researchers did to the participants in the experimental and control groups.

Results

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Discussion

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Appendix K

OGT+ Digital Routing Sheet

Please
Complete
by

Orange Grove Texts Plus Sign-Off

Please transmit in the following order. **NOTE:** For certain types of OGT+ projects, a title budget may also be found in the project's folder.

ACQUISITIONS:

Date Approved for Review by Editor-in-Chief: _____

Content Review Acquisitions Editor: _____

Title: _____

Project Discipline: _____

Project Status (Original OGT+, Previously Published, Mixed): _____

Title Budget Required? _____

Comments:

DESIGN AND PRODUCTION: _____ Date: _____

PDF OK for printing? _____ Mftg costs with IBT: _____

MARKETING: _____ Date: _____

Price: _____

BUSINESS: _____ Date: _____

DIRECTOR: _____ Date: _____

Appendix L

Notes from Presentation by
Dr. Steve Acker

The following account is a synopsis of a description by Dr. Steve Acker, Research Director of eTextOhio/Digital Bookshelf, of the [Ohio Digital Bookshelf](#) project from a webinar produced by the FIPSE Open Textbooks project (Grant # P116Y090040 for 2009-2011) on November 9, 2010.

The Centrally Organized Approach

With the goal of producing 230,000 new graduates in the next 10 years and earning a good return on the investment that will require, Ohio has incorporated into its higher education strategic plan three strategies that, together, are intended to reduce costs for students while improving learning outcomes:

1. Work with traditional commercial publishers to reduce costs
2. Engage open educational resources
3. Introduce personal learning environments

Textbook affordability is a key part of reducing costs. The textbook is associated with improved learning outcomes as well, in that it provides students with academic preparation and engagement necessary for enrollment, retention, and graduation of those students. To these ends, Ohio has embarked on the Ohio Digital Bookshelf project.

Since autumn of 2010, the state has been negotiating with traditional commercial publishers to bring prices down in the short term. The majority of the market for educational materials is with these publishers and a small increment of change can produce a substantial impact. The course with the greatest enrollment among the state's 66 colleges and universities is introductory psychology with 70,000 students each year. The project found a way to offer students a digital version of a textbook selected by the faculty member. Their survey identified the 23 popular introductory psychology textbooks that were offered by the five publishers Cengage, McGraw-Hill, Worth, Wiley, and Pearson. They all agreed to allow the project to promote a digital version of their textbook at a price up to 70% off the list price of the new print edition. In return, the project offered a Digital Pioneers Workshop for faculty new to digital materials and a link directly from the syllabus in which the text was being used to the text through the digital bookshelf. This effort reached 49,564 students in 23 participating institutions during the first semester of its implementation.

Ohio has initiated two programs that support open educational resources, the Faculty Innovator Program and the Textbook Affordability Grants. The Faculty Innovator Award Program is entering its third year with an annual allocation of \$10,000. Each of the awards is approximately \$1,000, but the recognition is the main driver of the program. Award winners come to Columbus, the state capital, to attend a reception and meal with the Chancellor, receive the award in a ceremony that receives considerable press coverage, and are recognized on the state website as faculty who have made real contributions to Ohio students and the affordability of their education. Carl Stitz and Jeff Zeager were among those awarded the prize in 2010 for their *College Algebra* open textbook. The efficiency of the Faculty Innovator Program lies in the fact that it rewards completed activity.

The other program, the Textbook Affordability Grants, funds projects from very near the start. The program was designed to fund five projects with about \$50,000 each, but only four have been selected for funding as of this writing. Teams of at least 15 faculty representing at least

three independent campuses develop, build, and package a complete set of learning materials for a course with high quality content. For each program, the statewide learning objectives of the course were defined in Ohio's Transfer Assistance Guidelines (TAG). Funds are released at three different times in the production cycle: \$20,000 at the start, \$15,000 after the first iteration has been reviewed by students, and after revisions have been made, the materials tested in classes and revised again and the course is offered for the third time, the final \$15,000 is released. There is no cost to Ohio students for using these materials.

A particular challenge has been the development of awareness among faculty across the Ohio campuses of the availability of these materials and the encouragement of their use. The remaining \$50,000 for the program that was not funded will be used to develop that awareness and promote the use of the materials with workshops and materials.

The return on investment for replacing traditional textbooks with the new materials is already positive with only 23 campuses participating. The cost of replacement was calculated by multiplying the cost of the new text by the number of students taking the course by 0.4 because students have several less expensive ways to obtain the material besides buying a new textbook. As usage increases, the return is expected to be quite significant.

In three to four years, students will go to the bookshelf for modularly organized material suited to their characteristics, the personal learning environment. Building learning objects around learning objectives that are common to the course taught on different campuses to different student groups, a framework can be assembled that allows for the accommodation of different learning preferences, cultural contexts, and readiness levels.

Tragedy of the Commons

Publishers raise prices every year because they have to capture revenue from a reduced number of students who buy new books. Bookstores, which typically earn more money on the used cycle than the new books, promotes used over new, further reducing the revenue flowing to the publisher. Students try to find the lowest cost resource that they can use for most courses. So, by all acting in their own self interest, these players all contribute to the rising cost of textbooks.

Appendix M

Open Text Resources:

- Features
- Operational and Financial Models

Features of Open Textbook Resources

	Open Textbook Resources					Commercial Textbook Resources	
	Connexions	Orange Grove Texts Plus	Global Text Project	Wikibooks	CK-12	Textbook Media	Flat World Knowledge
View on website	✓		Some	✓	✓	Some free with ads	✓
Download	✓ PDF; XML; EPUB; HTML	✓ PDF	Varies	✓ PDF; HTML	✓ PDF; EPUB	✓ PDF for a fee	✓ PDF and EPUB for a fee
Self-print	✓	✓	Varies	✓	✓	✓ some PDF for a fee	✓ for a fee
Commercial on-demand print	QOOP.com	IBT, Inc.	Varies			✓ in hybrid bundle	✓
Modular	✓	Some texts	Some texts		✓	Chapter downloads	✓
Edit online	✓ with Rhaptos			✓ w/ Wikimedia	✓ with Flexbooks		✓
Ancillaries available	Homework and problem sets	WebAssign			Videos, quizzes		Test banks; instructor manuals; lecture slides
Quality control	Lens system; Community	Peer review; Editorial review	Quality Assurance Board	Community	Peer review; Editorial review	Peer review; Editorial review	Peer review; Editorial review
Copyright	Creative Commons	Creative Commons	Creative Commons	Creative Commons; GNU	Creative Commons	Traditional copyright	Creative Commons
Open contribution	✓ with registration	Moderated contribution		✓ with account	Moderated contribution		
Funding source(s)	Grants, donations	Florida Legislature	Grants	Donations	Foundation	Advertising	Premium Content

Operational and Financial Models

Resource	Model
<p>Connexions www.cnx.org</p>	<p>The repository holds learning content in over 1600 relatively small chunks or <i>modules</i>, which are free to download for anyone with an account. All modules in the <i>content commons</i> are openly licensed and can be continuously updated and woven together in various arrangements within or across disciplines. Authors do not receive royalties.</p> <p>Connexions is supported by the William and Flora Hewlett Foundation, the Maxfield Foundation, and the Connexions Consortium, among others, and accepts donations through the website.</p>
<p>Orange Grove Texts <i>Plus</i> http://www.theorangegrove.org/about.asp</p>	<p>Orange Grove Texts <i>Plus</i> (OGT+) is a partnership between the Orange Grove and the University Press of Florida, with WebAssign producing ancillaries and Integrated Book Technology (IBT) providing the on-demand printing. When a printed open textbook is purchased, a small fee is added to support the maintenance of the OGT+ collection.</p> <p>The Orange Grove, Florida's digital repository, is supported by the Florida Distance Learning Consortium, which is funded by the Florida Legislature.</p>
<p>Global Text Project http://globaltext.terry.uga.edu</p>	<p>The Global Text Project started in 2004 as a graduate class project at the University of Georgia in the U.S. in which students developed the open textbook, XML: Managing Data Exchange. The goal of the project now is to provide free, open textbooks in a variety of topics to students around the world, especially in developing countries.</p> <p>The Global Text Project was initially funded by the Jacobs Foundation and through gifts made by private individuals.</p>
<p>Wikibooks http://en.wikibooks.org</p>	<p>Wikibooks is a Wikimedia project for collaboratively writing open-content textbooks that anyone can edit by clicking the <i>edit</i> link near the top of each Wikibooks page. Contributors maintain the property rights to their contributions, while the Creative Commons Attribution-ShareAlike License or the GNU Free Documentation License ensures that the submitted version and its derivative works always remain freely distributable and reproducible.</p> <p>Wikibooks is funded by the Wikimedia Foundation, which is a non-profit organization that depends on donations to operate.</p>

Resource	Model
CK-12 http://www.ck12.org	<p>CK-12 Foundation is a non-profit organization with a mission to reduce the cost of textbook materials for the K-12 market both in the U.S. and worldwide. Using an open-content, web-based collaborative model termed the "FlexBook," CK-12 intends to pioneer the generation and distribution of high quality educational content that will serve both as core text as well as provide an adaptive environment for learning through the FlexBook Platform™.</p> <p>CK-12 is funded by the Amar Foundation and by Vinod and Neeru Khosla.</p>
Textbook Media http://www.textbookmedia.com	<p>Textbook Media is a private for-profit company that sells PDF versions with advertising for a very low price and printed and iPhone versions without advertising of books, workpapers, lecture guides, and study guides. All materials are covered by standard copyrights with all rights reserved.</p> <p>Textbook Media follows the standard business practice of earning profits from the sale of merchandise supplemented by advertising, which reduces costs to students.</p>
Flat World Knowledge http://www.flatworldknowledge.com/	<p>Flat World Knowledge is a private for-profit company that offers online access to openly licensed texts without charge, and charges a fee to download a PDF or buy a printed book or accessory (such as online flashcards, practice quizzes, and audio books and study guides). Authors are paid royalties from sales of their work, to which they retain Creative Commons copyright.</p> <p>Flat World Knowledge has been funded initially by venture capital.</p>