



Okanagan College

Open Education Strategy & Action Plan

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June 2021



Okanagan College respectfully acknowledges that our Penticton, Kelowna and Vernon campuses are located on the unceded territory of the Syilx Okanagan people, and our Salmon Arm campus is located on the unceded territory of the Secwepemc.

Contents

Executive Summary	4
Open Education Strategies Summarized	5
Overview	7
Objective of the Open Education Strategy & Action Plan.....	8
Goals of the Open Education Strategy & Action Plan	9
Challenges	10
Ties to the Okanagan College Strategic Plan	10
OER Best Practices and Guidelines	12
Defining Open Education & Open Education Resources	12
Why Open Education?	13
Who is leading Open Education?	14
OER Strategies across the Province	14
Purpose	15
Open Education Strategies.....	16
Strategies in Action	17
Potential Open Education Timeline for OC.....	18
Measuring Success	18
OER Supports Accessibility.....	19
OER Supports Indigenization.....	20
Research on OER.....	21
Designing, Adopting, and Utilizing OER at Okanagan College	26
OER Quality Assurance.....	26
Ownership and Sharing.....	26
Responsibilities of OER Creators or Owners	26
Technical Formats of Open Materials	27
Licensing.....	27
Potential Outreach & Communication Strategy	27
Conclusion	29
References	31
Appendices	36
Appendix A: Sample OER Rubric	36
Appendix B: Print-on-Demand Tracking Information	39



Appendix C: UBC Okanagan Policy O-131.2: *Digital Assessment Tools* 41

Appendix D: BCcampus Institution Inventory 50

Appendix E: Example of Board of Governors Policy & Procedure to encourage the adoption, adaptation, and creation of Open Education Resources. 53

Appendix F: Summary Report on the Copyright & OER Survey 62



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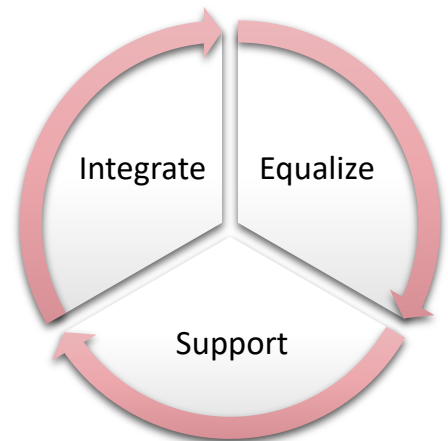
Executive Summary

Mission: Okanagan College supports, promotes, and advances openness within our institution.

Vision: Growing knowledge, access, and teaching through Open Education Practices. We seek to reduce barriers to education and research by supporting Open Education Practices.

Values: Openness, equity, autonomy, academic freedom, collaboration, affordability, student success.

*The main goals of Okanagan College's Open Education Strategy and Action Plan are to **integrate** Open Education Practices and Open Education Resources into curriculum and curriculum development processes, to **equalize** access to education and course materials, and to **support** learners and educators in accessing, creating, and utilizing open resources.*



Removing barriers to education and providing equal access to learning resources are key factors in ensuring student success, ensuring the College is meeting accessibility needs, and ensuring Indigenous and marginalized students are supported. Increasing and supporting Open Education Practices and Resources, utilizing library resources for curriculum, providing copyright support and outreach to faculty and instructors, and ensuring educators know their rights under copyright law, all create opportunities to reduce barriers.



Open Education Strategies Summarized

As part of the College's new Strategic Plan, incorporate Open Education Practices and Resources as key strategies to make education more accessible, affordable, and flexible, and ensure it remains a focus for the College;

Provide education and training for staff on Open Education Practices to further promote knowledge and adoption of open education, and to ensure the College is developing in-house expertise on OER and open education publishing strategies;

Collaborate with instructional departments to include open education in department education plans, transition to 'zero textbook cost' courses where possible, and integrate OER into courses through new and revised course and program curriculum development processes;

Support and encourage the adoption, adaptation, and creation of OER at the highest levels through a Board of Governors and/or Education Council policy, and by including OER in new and revised course and program proposals, as appropriate;

Dedicate financial support to open education. Ensure educators have the time needed to develop open materials and to adapt courses to align with open content. Ensure educators have supports to apply for external open education grants, and devote staff to supporting open education;

Accurately track the use of OER at the College to provide readily available reporting data, and offer, advertise, and track Print-on-Demand services through the College Bookstore.

Open education encompasses different factors and outputs. These areas require leadership from the College to support and ensure success of an Open Education Program, which includes defined strategies to monitor outcomes, staff expertise in open education and supportive technologies, and justification through evidence-based research to advance open education initiatives and content.



Research Shows Open Education Practices and the Use of Open Education Resources:



Increases student retention & course enrollment



Improves student learning outcomes



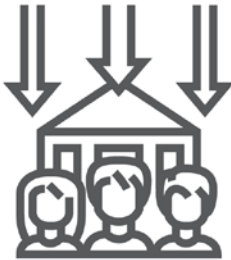
Reduces drop, fail, & withdrawal rates



Increases collaboration & engagement



Increases access to teaching & learning resources



Reduces barriers to education



Supports students with accessibility needs



Reduces the cost of education



Supports Indigenous & marginalized students



Overview

Open Education Practices are becoming commonplace in higher education, including the creation, adoption, and adaptation of Open Education Resources (OER). Open Education includes resources, tools, and practices that are free of legal, financial, and technical barriers (SPARC, n.d.). Open Education Resources specifically can be defined as teaching, learning, and research resources that are free of cost and access barriers, and hold the legal permissions to be openly used, usually through open licenses (SPARC, n.d.). As this report demonstrates, the high cost of commercial textbooks is a barrier to education, particularly for historically marginalized student groups, such as Indigenous students.

The research section of this document provides ample evidence that the quality of Open Education Resources is equal to or higher than traditional course materials, and student outcomes are the same or better when they use OER in their courses. The flexibility of open education creates opportunities for educators to improve teaching and learning practices, while giving them ultimate control over their learning materials. If the key to a better future for our students and communities is education, then exploring all ways to enhance the success of our students should be a primary focus as a leading post-secondary institution that aims to expand educational opportunities for our communities.

Currently, Okanagan College informally tracks open textbook adoptions. In 2020/21, 52 open textbooks had been adopted and were being used by approximately 954 students. This number could be even higher but due to a lack of consistent reporting the numbers are difficult to accurately track. Additionally, the OC Bookstore began tracking the number of open textbooks printed on-demand at the request of students, with 22 open textbooks printed in 2020/21.

Foundational documents including both the [Cape Town](#) and [Paris OER Declarations](#) formed the basis for creating a case for the use of OER worldwide (Allen et al., 2015). However, there is a need to address strategic actions and develop localized goals on how to achieve wider adoption of OER at Okanagan College. The [2020 mandate letter](#) issued to Okanagan College from the BC Government specifically outlines, “advancing and supporting open learning resources” as part of the priority to “develop and recognize flexible learning pathways for students to access postsecondary education and skills training” (Mark, 2020, p. 3). This OER report will provide a concrete plan to support this specific priority, as well as a number of other priorities outlined in the mandate letter.

The work of the OC Open Education Working Group should be mentioned as part of the work of open education being done at the College. This informal group is led by Library Services and is comprised of students, librarians, instructional faculty, staff, and administrators. In 2020-21, the group met three times to plan activities and discuss opportunities for events, initiatives, and OER strategies going forward. One member (Roën Janyk) is also a member of the BC Open Education Librarians’ group, which meets on a monthly basis to discuss open education efforts and initiatives across BC post-secondary institutions.

This report would not have been possible without the generous support of BCCampus and the \$10,000 Time Investment Grant that was awarded to Okanagan College in the winter of 2021. This grant provided author, Roën Janyk, with release time to complete the report, work with faculty and instructors to adopt Open Education Practices in their teaching, gather feedback on barriers to adopting open education teaching practices, develop and deliver workshops on open education, collaborate with colleagues across the Province on Open Education Practices, develop an online Open Education Guide



for Okanagan College, and work with OC's Library Director and Business Librarian to develop an OER and Copyright survey that was distributed to faculty and instructors at the College in April 2021.

Objective of the Open Education Strategy & Action Plan

For more than a decade Open Education Resources (OER) have reduced barriers to education for students, and increased flexibility in teaching practices for educators. Open resources have been used internationally by educational institutions, non-profit and for-profit organizations, government bodies, professional practitioners, and more. While progress has been made to expand the availability of content and the reach of use, we have much further to go for the use of OER to become mainstream (Allen et al., 2015).

The current commercial textbook market contains numerous limitations for both students and educators. Faculty and instructors are unable to modify course textbooks to local contexts, and publishers often capitalize on teachers with limited time to create their own resources, or take advantage of the limited supply of specialized titles. Moreover, new access models to electronic versions of textbooks, often called 'Inclusive Access Programs' have the optics of being accessible, affordable, and environmentally sustainable, however, these programs result in students paying large fees to temporarily access materials they do not own (Williamson, 2019). In essence, these programs are "large-scale text rental programs" (Reed, 2019). Technological and geographic barriers arise when access is directed through proprietary learning platforms. Due to territorial copyright agreements with publishers, in many cases, Canadian students do not have the same access to electronic versions of textbooks that students in the US have (Janyk & Lomness, 2020). Students who are far from being 'digital natives' still overwhelmingly prefer print textbooks, therefore e-textbooks are only advantageous for students who prefer digital textbooks or who have access to a device or technology that can host an e-textbook (Jhangiani, 2017). Few alternate options exist for students to obtain used copies of learning materials, and students who opt out of buying the online textbook or who may have previously chosen to share a textbook, no longer have these options if each student is required to have access to the online edition in order to gain access to required quizzes or associated assignments. The lack of a physical product means that students cannot sell books at the end of a course in order to recoup some costs, and they cannot put less expensive, used copies, on the market for other students (Williamson, 2019). These new models for textbook access are anything but inclusive for students. However, publishers greatly benefit, if each student who enrolls in a course uses this model for accessing textbooks, the publisher gets a 100% sell-through rate, it eliminates the resale market, and there is no cost to the publisher to print materials or sell the same text to a different student (Williamson, 2019).

In fact, a former Kwantlen Polytechnic University student has filed a lawsuit against textbook publishers McGraw-Hill, Pearson, and Cengage, arguing that the Inclusive Access Program offered by the publishers through KPU limits access to post-secondary education course materials, eliminates and suppresses competition, reduces student-consumer choice, and the higher prices amount to an illegal and/or anti-competitive overcharge (*Kyle Harman Singh Dhamrait v. McGraw-Hill, Pearson Education, Cengage Learning, McGraw-Hill Ryerson, Pearson Canada, Cengage Learning Canada*, 2020). Another lawsuit has been filed by a South Carolina used bookstore owner who is suing Trident Technical College on the basis that its Inclusive Access Program is anti-competitive (Reed, 2019; Bowers, 2020).

Additionally, commercial publishers have introduced 'Digital Assessment Tools' which are sold separately or packaged alongside digital or print textbooks. These add-on assessment tools cost



students more money and leave them with no alternatives to course participation and course assessment. The University of British Columbia Okanagan Campus (UBCO) Senate recently passed a policy to protect the financial interest of students and ensure equitable access to all forms of digital learning technologies, by disallowing all fee-based Digital Assessment Tools at UBCO (see Appendix C). Okanagan College should be cautious about moving forward with any kind of Inclusive Access Textbook Program, or built-in Digital Assessment Tools, in favour of more equitable and affordable textbook access options.

Okanagan College's Open Education Strategy and Action Plan provides insight into the work currently being done to promote, adapt, and adopt Open Education Practices at the College, as well as recommendations for moving forward. It outlines the greatest opportunities, challenges, and barriers to success. This strategy report is meant to serve as a starting point, and should be considered a living document, with future adaptations to be expected as progress is made.

Goals of the Open Education Strategy & Action Plan

- Develop an Open Education strategy and action plan that meets the needs of Okanagan College, including ongoing campaigns to publicize the OE strategy, and an ongoing plan to educate college staff on open education through workshops and promotional campaigns;
- Assign the tracking of open textbook adoptions at Okanagan College to one individual or department for long-term sustainability, including developing a method for routinely collecting open textbook adoptions across courses in order to accurately report to BCcampus, the Ministry of Advanced Education, and to report internally;
- Identify key courses and degree or diploma pathways as candidates for adopting Open Education Resources, thereby reducing barriers to education;
- Continue working with faculty, instructors, and portfolios to reduce reliance on traditional textbooks and/or course materials, and find alternative low or no cost, quality educational resources to support specific courses and programs;
- Integrate Open Education Resources and Open Education Practices into curriculum development practices, and ensure OER are preferred during curriculum design and resource selection for new and revised courses, when possible;
- Define actionable objectives and outcomes of the OE strategy on an ongoing basis, including assessment strategies and measurable outcomes of Open Education projects;
- Combine the power of OER, library resources, the College's Access Copyright license (if renewed), and Fair Dealing copyright laws, to provide students with free access to course materials, regardless of discipline;
- Clearly identify supports for open practices at Okanagan College:
 - OC Library (offering support to plan, find, create, and share OERs and licensed library resources that are free to students, in the form of expertise, advice, training, and workshops)
 - Copyright services (providing advice on copyright requirements, guidelines, and supports);
 - Supports for scholarly communication and data management (supporting OC faculty, instructors, and staff in publishing and sharing their research findings and data);



- Learning and Applied Research (professional development in teaching and learning practices, integration of educational technologies, development and delivery of courses and programs, and technology-enhanced learning opportunities).
- Collaborate with other BC post-secondary institutions on developing open education strategies and initiatives that may allow for sharing of ideas and goals across institutions.

Challenges

Throughout the process of completing this report, much consultation took place with faculty and instructors from within and outside the College. The time required to adapt an existing course to align with Open Education Resources was commonly identified as a barrier to adopting OER materials rather than commercial textbooks. This was often stated as the primary challenge, more so than finding quality resources. This speaks to the need to provide faculty and instructors with support in the form of time release or additional staffing (such as faculty support from educational technologists, librarians, or student assistants), which would give faculty and instructors more time and resources to adapt current courses to use open education materials. When new courses are developed and proposed, OER or low-cost learning materials should be encouraged over commercial textbooks, therefore eliminating the need to adapt courses for OER after the course has already been developed and offered.

Ties to the Okanagan College Strategic Plan

Whereas, Okanagan College transforms lives and communities, Open Education Practices can contribute to high quality educational experiences and respond to the needs of students. Open education supports learner success by improving student outcomes and retention. Open Education Resources improve access to education by reducing barriers and creating equal access to course materials for all students. The flexibility and open nature of OER ensures continuous improvement of learning resources, the ability to share and build upon resources supports collegiality and collaboration, and open licenses associated with OER encourages the incorporation of diverse perspectives into learning materials. The born-digital nature of open education resources supports environmental sustainability, and also facilitates the ability to easily update learning materials for currency and innovative ideas.

The impacts of an Open Education Program at Okanagan College can be measured by tying the program outcomes to the specific objectives of the current and future Strategic Plans.

Open Education Resources (OER) and Open Education Practices (OEP) support learner readiness and success:

- Students with access to OER have reduced barriers to education due to equal access to course materials and the lack of costs associated with these materials. All students can have access to learning materials regardless of their contact with a physical campus bookstore or their financial position, professors and instructors can be assured all students have access to the required course materials even before a course begins;
- Staff supporting students such as Learning Centre Coordinators, Librarians, DE tutors and others, all have access to the required course materials to support students;
- Students can become more engaged with OER by having the ability to contribute to and even create open resources;
- Learners have access to OER both prior to courses beginning and after courses end, ensuring access to course materials both when coming into and beyond Okanagan College;



- International students have the same access to OER as domestic students. Content can be customized to a local context, allowing international students to use materials with localized examples.

OER & OEP ensure excellence in teaching, programming, and applied research:

- OER supports all course delivery methods, face-to-face, e-learning, and blended approaches, and supports students learning from remote locations as well as those with easy access to campuses;
- As courses and programs at the College change, so too can the course materials that support them. OER can include resources from community members, fellow students, and professionals, ensuring learning resources remain current and applicable;
- Professors and instructors have the flexibility to develop their own course materials or adapt existing materials to their liking, giving them ultimate academic freedom over their course resource;
- OER and OEP foster opportunities for teaching professionals to support one another by sharing resources, building upon learning materials created by others, and encouraging collaboration between educators with varying levels of experience, skills, and knowledge;
- Sharing applied research and related data with open licenses ensures other scholars can build upon research activities at OC, to establish and further fields of study and lead to improvements for communities, employers, and students.

OER & OEP support working with, and learning from, the Indigenous community:

- Indigenous communities can be included in the creation and development of open course materials;
- The creation and adaption of OER offers more opportunities for Indigenous authors to contribute to the scholarly publishing landscape;
- Diverse perspectives and local contexts can be included in learning materials through engagement with Indigenous partners and communities;
- The use of Open Education Resources can reduce barriers to education for traditionally marginalized communities and individuals, including those living in remote communities, Indigenous learners, and first-generation post-secondary students.

OER & OEP support serving and engaging the community:

- A commitment to more affordable course materials demonstrates that the College recognizes the hardships of students;
- Alumni remain able to access open learning resources even post graduation;
- Community members with expertise and local connections can be invited to contribute to the creation of learning materials;
- Students and Student Associations have been asking for more affordable education options; reducing the cost of course materials demonstrates the College is listening and responding to their voices.



OER & OEP focus on organizational sustainability:

- Financial resources are available through external granting agencies such as BCcampus, to support Open Education Practices and to support the development and review of open textbooks and learning resources at OC;
- OER can be used across campuses in both online and in-person courses;
- Employees rewarded for championing and supporting OER and OEP may be more likely to stay with Okanagan College, while veteran OER educators can support and educate new staff. Diverse opinions and voices are encouraged during the process of creating open textbooks;
- The processes related to creating and disseminating OER are more environmentally friendly than commercial textbooks due to being born digitally. Textbook editions with small revisions do not require full reprinting and outdated unsold editions do not go unused. Open textbooks are easily distributed through the Internet and do not require global shipping.

As the College embarks on creating a new Strategic Plan, the inclusion of Open Education Practices is strongly encouraged, and could play a crucial role in the success of open education at the College. Specifically, initiatives that support the integration of OER and Open Education Practices throughout the institution, supports for students that reduce barriers and costs to education and increase accessibility, outcomes that result in training and support for staff to adopt and develop Open Education Practices and content, objectives that include infrastructure to support open education, and strategies that promote collaboration with partners outside of the College to further promote and advance open education in our province.

OER Best Practices and Guidelines

Defining Open Education & Open Education Resources

Open Education includes resources, teaching and learning practices, and tools that are freely available to be used, shared, or adapted. They are typically free of legal or financial barriers to use (Spark, n.d.). Open Education combines technology with traditional knowledge sharing and collaboration to create education that can be responsive to the needs of learners (OE Consortium, n.d.). Definitions of OER put forth by the William and Flora Hewlett Foundation and UNESCO are widely accepted, but the general consensus is that an OER must be free (have no cost) to access and legally modify, including the ability to retain, reuse, revise, remix, and redistribute (Allen et al., 2015).

Education has always been about sharing, in the form of professors and teachers sharing their knowledge and imparting it to others. Open education capitalizes on online technologies now made possible due to the existence of the Internet. The Internet has created a platform to easily disseminate information and connect educators with one another. Open Education provides open access content and an open ability to modify and use information. This allows education to be personalized, customized, and made unique for particular audiences (OE Consortium, n.d.).

Open Education Resources (OER) encompass teaching, learning, and research resources that are free to use, adapt and repurpose. According to the William and Flora Hewlett Foundation (2013), OER are:

“Teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and re-purposing by others. Open educational resources include full courses, course materials, modules, textbooks,



streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge.”

The 5Rs of open include being able to legally retain, reuse, revise, remove and redistribute resources. Creators of open resources choose the licenses assigned to their content, giving them full control over how their materials are used or adapted. The licensing status of educational resources is what determines how a resource can be used, and the legal mechanism most educators are familiar with is that of copyright (Seaman & Seaman, 2020). There are three copyright considerations that should be of most interest to educators when selecting resources for courses:

- **Copyright status of materials** selected for use in a course. Whereas copyright owners have control over how their work is reproduced, including the right to payment and whether the author has granted or sold those rights (such as to a publisher in a traditional textbook model);
- **Public domain content** that is no longer eligible for copyright due to expiry of rights, or the author dedicating the content to the public domain. Public domain content is not protected by any copyright law and it may be freely copied, shared, altered, and republished (Creative Commons, n.d.);
- **Creative Commons (CC) licenses** are modifications to traditional copyright licenses that grant some rights to the public, but the licenses are decided upon and granted by the author, and the author retains copyright in most cases. A variety of CC licenses exist, and all CC licenses require author attribution (Seaman & Seaman, 2020).

OER promote collaboration between individuals by enhancing content created by one person through collective creativity and improvements, and open pedagogy encourages learner engagement by involving students in learning and teaching processes. Due to the open nature of the content, learners are no longer only consumers of information, but they can also contribute to the production of content, and they can become involved in selecting and repurposing materials. As a result, educators can take advantage of flipped classroom teaching approaches, introduce more innovative teaching practices, and share resources across disciplines.

Why Open Education?

Education, although intended to create opportunities for people, inherently contains barriers. An educational institution has its own capacity limits. Within educational institutions, barriers exist amongst students, where individuals begin on uneven playing fields. Free and open access to education resources removes some barriers to education. The price of commercial textbooks has increased significantly, with textbook costs passing the rate of inflation by three times (SPARC, n.d.). Through the introduction of OER, students can learn about alternate viewpoints and access materials in alternate formats. Faculty can collaborate and build upon resources or research conducted by others. Learning resources can be



The 5Rs of OER Infographic by SUNY OER Services. This work is licensed under CC BY 4.0.



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translated, transformed according to Universal Design for Learning Principles, altered and recreated, all within the context of open. Open means that anyone can access educational materials, students who have graduated or individuals interested in expanding their own knowledge. Scholars can build upon existing research to better the world and their own communities, and supportive learning communities can be created to foster an educational environment that is accessible, free, and openly available.

Among BC university students, 54% do not purchase required textbooks for courses, 26% of students do not register for a course due to the textbook costs, and 27% of students may take fewer courses due to textbook costs (Jhangiani & Jhangiani, 2017). While some may argue that moving to open textbooks could affect revenue for campus bookstores, Jhangiani and Jhangiani (2017) found that a majority of students now choose to purchase textbooks from sources other than a campus bookstore, instead opting for sources such as online retailers, the used textbook market, or illegally downloading pirated copies from the Internet. Therefore, moving to open textbooks should not further affect the revenue generated by ancillary services at post-secondary institutions.

Who is leading Open Education?

BCcampus is the leader of open education in British Columbia. They are responsible for managing grants and they are the open education advocates for post-secondary institutions across the Province. The BC Ministry of Advanced Education is fully supportive of Open Education Practices, and engages in promoting and supporting the use of open textbooks and other open education materials.

At Okanagan College, the Library in collaboration with Learning and Applied Research and Educational Technology areas, are the leaders of open education. Faculty, instructors and staff should be referred to these areas for further assistance with implementing, adapting, or creating Open Education Resources and engaging in Open Education Practices.

OER Strategies across the Province

As part of the work conducted by BC's Open Education Librarians group, an environmental scan of open education strategies at post-secondary institutions was conducted (Fields et al, n.d.). The goals of these discussions were to gain a better understanding of the supports and services offered by institutions for open education efforts, and to help to inform the strategic directions at other institutions.

The only strategic plan that exists for BC post-secondary institutions specifically devoted to OER is at [Kwantlen Polytechnic University \(KPU\)](#). However, a number of other library and post-secondary strategic plans encompass open education as smaller parts of broader strategies. For example, [Douglas College's 2020-2025 Strategic Plan](#) specifically addresses expanding the availability of OERs at the College to support the objective to empower students to be active partners in their educational experience, and to improve affordability and learning outcomes. Thor Borgford, Douglas College's VP, Academic, and Provost, also issued a [personal endorsement](#) for Open Education Resources. KPU, UBC, Douglas College, TRU, SFU, BCIT, and Langara College, are well ahead of Okanagan College in terms of supporting Open Education Practices at their respective institutions.

As outlined in a case study by Morgan (2019), the Law Enforcement Studies program at the Justice Institute of BC introduced a zero-cost textbook program, with the goal of having the entire two-year diploma program designated as a zero-cost textbook program. It was found that through the inclusion of open digital resources, the program was made more accessible and provided greater technology-enabled learning and teaching environments. Additionally, JIBC witnessed benefits other OER projects



have also seen in terms of increased student recruitment, the potential to improve teaching and support learning, and viral marketing of the program due to the quality of teaching and learning offered in the program.

Challenges exist across institutions in terms of ongoing funding supports for designated OER positions, OER grant programs, and administrative supports. Fields et al. (n.d.) reported that the administrative support required to operate grant programs and to support faculty was an ongoing challenge. At institutions in which funding was obtained to facilitate grants, the administrative support needed to maintain those grant programs was often underfunded and undervalued, making a lack of administrative support a barrier for many institutions to participate in grant programs. Although invisible, administrative work was identified as a considerable commitment in terms of time and labour.

The environmental scan found that most institutions manage OER grant programs through the Library or in partnership with other campus units, such as Teaching and Learning departments or the Provost's Office. In all cases, funding for grants was unstable and not ongoing, and funding had typically been secured through exterior grant programs (such as through BCcampus), or offered on an ad hoc basis, such as with year-end surplus funding from institutions. Funding was also provided for student positions, but there was no long-term reliability of funding for these positions. The leadership of Open Education Programs and supports was primarily assigned to a specific librarian at a specific institution. The structure of having this work fall to one person brings up long-term sustainability issues, and capacity was identified across all institutions as being a barrier to further promoting and advancing open education. All institutions reported having a lack of staffing to support open education, even those with existing student, staff, and coordinator positions.

The services related to open education currently provided by post-secondary institutions vary and include consultation services, administration of grant or incentive programs and supports, outreach and advocacy, workshops and programming, and tracking open textbook adoptions. Most institutions do not advertise OER support services due to fears of being inundated with requests for support. Also of note in the environmental scan were challenges collaborating with other units within institutions, such as Teaching and Learning units and teaching departments (Fields et al., n.d.).

Purpose

The purpose of this document is to outline Okanagan College's strategy to further implement open education at the College. Adopting more open education practices aims to achieve the following:

- Enable more equitable access to learning resources for students;
- Improve student success through increased and more equitable access to learning resources;
- Create more accessible services and supports for all students, particularly those from traditionally marginalized backgrounds, such as those from economically disadvantaged circumstances, Indigenous students, and first-generation post-secondary learners;
- Encourage faculty and instructors to equip a diverse array of learners to be engaged citizens and effective researchers;
- Allow faculty and instructors to bring more flexibility and relevancy to their teaching practices;
- Support educators in the creation, adoption, and adaptation of Open Education Resources, regardless of department or subject area;



- Incorporate the selection and collection of open access resources as part of the Library's collection development activities;
- Increase conversations around inclusivity, accessibility, diversity, equity, flexibility, and care for our students;
- Collaborate with the open community to support Open Education Resources and grow internal institutional knowledge;
- Address identified challenges or barriers to adopting open resources;
- Enable more courses to become 'zero textbook cost' courses;
- Take an 'open first' approach to learning resources, where open resources are the first choice of resources when possible.

Open Education Strategies

- Identify the priority of actions needed to be taken to advance the use and development of Open Education Resources at the College;
- Outline open education and everything it stands for as key areas in the College's next Strategic Plan;
- Address possible challenges to adopting Open Education Practices with specific steps to mitigate those challenges, while also framing them as opportunities. For example, time is a barrier for faculty and instructors to adopt open textbooks, therefore the College should aim to support faculty and instructors in the form of time release to adapt existing courses to use OER;
- Engage in education and training events for OC staff to promote knowledge and use of open education, as well as support other post-secondary institutions and learning organizations throughout BC to increase Open Education Practices;
- Librarians work with faculty and instructors to transition courses to become 'zero textbook cost' courses through the use of open resources, the use of the Library's online reading list service, flexing the rights of educators under copyright fair dealing rules, and migrating away from print coursepacks when possible;
- Ensure librarians, faculty and instructors within Educational Technology, and the Learning and Applied Research teams, are experts on OER and can act as point people for those wanting to learn more;
- Assign local faculty and instructors as OER fellows to help raise awareness of OER, to identify opportunities to replace traditional textbooks, and to champion open education in a peer-to-peer manner;
- Encourage the inclusion of open education in department education plans, and new and revised courses and programs; doing so can support faculty and instructors in adopting, adapting, and creating Open Education Resources that increase access to relevant, current, and flexible learning content;
- Grow the College's publishing infrastructure and systems to support educators in the creation and adaptation of Open Education Resources (for example, growing internal institutional knowledge of Pressbooks);
- Dedicate financial support locally in the form of grants, funded positions, or funded projects to support faculty and instructors in the development, adoption, and promotion of OER;
- Grow the Open Education Working Group to become a prominent resource on Open Education at the College, in order to act as a resource college staff can turn to as a Community of Practice.



The primary goal of this working group is to promote and support Open Education Practices, and the use of OER at OC;

- Create an OER ‘roadmap’ for a rolling two-year period, including a plan of activities and areas of focus, for example, portfolios or departments of focus, and specific events or workshops to host;
 - Possible workshop topics could include Universal Design for Learning (UDL) information events, how to apply UDL to curriculum development, where to find open materials, research on student outcomes and OER, etc.
- Develop a self-enrolling OER Moodle course, monitored and maintained by an OC librarian that includes information about OER at the College, and includes a discussion board for faculty and instructors to pose questions and create an open community to discuss open education locally;
- Incorporate OER into current internal funding opportunities, such as Grants in Aid applications;
- Integrate OER into curriculum practices through the curriculum development consultation process, and the new and revised course and program review processes. OER should be preferred during curriculum design and resources selection, when possible;
- Solidify the Print-on-Demand processes and workflows offered through the College bookstore, and include a formal tracking mechanism in the process (see Appendix B);
- Create and implement a policy approved by Education Council and/or the Board of Governors, as appropriate, to support and encourage the adoption, adaptation, and creation of Open Education Resources, put into practice through the curriculum development process undertaken by faculty and instructors, and through the process to bring revised and new courses and programs through to Education Council (see example in Appendix E).
 - New and revised curriculum proposals should include the evaluation of OER as part of the proposal and approval process;
 - A policy should address licensing, intellectual property, responsible parties, selection and evaluation of content, and technology such as hosting and authoring tools¹. Refer to Appendix E for examples.

Strategies in Action

- Okanagan College supports open from all directions, including open access research, open source systems, open data, and Open Education Resources. This commitment is evident in its use of Drupal on which the Institution’s website is built, Moodle on which the Learning Management System is built, the Quali Curriculum and Calendar Management System that is currently being implemented, and support for Open Education Practices and Resources;
- During program and curriculum design, Open Education Resources and Practices should be preferred when looking to resource selection and curriculum design;

¹ Policy highlights may include: OER use is not mandatory; OER use is appropriate where materials are of equal quality to commercial products; OERs can be adopted as is, adapted or modified, or be original creations; the College’s Intellectual Property policy is still applicable, and OER creation should be determined by Department Chairs, Deans, and in consultation with faculty and instructors; OER should be considered as part of new curriculum; The responsibility of applying correct Creative Commons licenses to OERs based on previous licenses is the responsibility of an instructor or faculty member (CC-BY license is preferred); OER best practices include accessibility and technology considerations; the College Library, Learning and Applied Research, Copyright Officer, and Educational Technology Coordinators will provide training and support in the area of Open Education. See Appendix E.



- Assist faculty and instructors in applying for grant funding from external sources such as BCcampus, to provide the College with funding that can be used to release faculty and instructors from regular duties, and to provide them with time to adapt current course offerings and lectures to align with and use Open Education Resources;
- Offer activities that support open education including those that raise awareness, promote openness, build communities, advise on open practices, and activities that provide training, and support adoption and adaptation of open practices.

Potential Open Education Timeline for OC

- **Phase 1 (July 2021 – December 2021):** Identify priorities for Open Education at OC. Integrate OER into the new Strategic Plan. Gain support from those at the highest level of the institution, including the Board of Governors and the OC Executive.
- **Phase 2 (September 2021 – April 2022):** Formalize processes related to the tracking of OER use at the College, Print-on-Demand workflows through the bookstore, textbook requests through the Library, online course pack requests through the Library, and other initiatives that support low or no-cost course materials for students. Include notes in the Registrar’s system/class finder on courses utilizing OER. Expand the Open Education Resources available to OC students.
- **Phase 3 (January 2022 – June 2022):** Have guidelines and/or policies in place that integrate Open Education Practices into new and revised course and program development. Recognize the development of open education materials as scholarly or professional activity, in accordance with local Collective Agreements.
- **Ongoing:** Open Education Working Group works closely with instructional departments to support the adoption and adaptation of Open Education Resources for OC courses. Increase the number of courses with low or no-cost course materials. Continue to provide learning opportunities in the form of workshops and webinars on OER, how to integrate OER into courses, supporting faculty and instructors moving to OER, and information about copyright.

Measuring Success

A number of methods exist for measuring success of Open Education Programs across institutions. According to Wiley (2018), success can be broken down into different areas of impact, as outlined below. The challenges related to measuring these impacts are the need for historical comparison data, having faculty and instructors who are willing and able to provide specific data, and accounting for confounding variables that could also be contributing to outcomes.

Open Education Program Impacts:

- Number of students enrolled in courses utilizing OER or low/no-cost course materials;
- Number of sections using OER (or percentage of overall sections);
- Number or percentage of high enrollment courses with OER as an option;
- Number or percentage of faculty and instructors trained in the use of OER;
- Number of programs, certificates, or degrees with an OER pathway;
- Completion of the BCcampus Institution Inventory (Appendix D), and improvements over time;

Progress and Completion Rates Impacts:

- Reduced course drop rates relative to a historical pattern or a control group;



- Impact on program or certificate completion rates relative to control group or historical patterns;
- Rates of course throughputs relative to control groups or historical patterns, which combines the impacts of course drops, withdrawals, and students earning less than a C letter-grade;
- Changes in tuition revenue;
- Grade differences when faculty and instructors assign OER rather than commercial textbooks;
- Number of courses students enroll in or number of credits taken (enrollment intensity) after taking a course that uses OER. Semester-to-semester persistence change when faculty or instructors assign OER or low/no-cost course materials rather than commercial textbooks.

Cost Savings Impacts:

- Total textbook savings for students using OER rather than commercial textbooks;
- Single term textbook savings of using OER rather than commercial textbooks;
- Number of students benefitting from OER;

Student Learning and Engagement Impacts:

- Timeframes around access to OER materials by students (ie. do they access OER materials earlier in a semester?);
- Measuring student engagement with open education learning materials (for example usage statistics of online resources);
- Student success improvement in terms of achieving learning outcomes based on course and program revisions, or enhancements due to the inclusion of Open Education Resources;
- Student perceptions of the quality of OER materials;
- Amount of student participation in the development of OER content or revisions;

OER Supports Accessibility

Accessibility refers to the use of a product, service, framework or resource in an efficient, effective and satisfying way by people with different abilities (ISO, 2008). Recent data estimates that 15% of the world's population lives with some form of disability (World Health Organization & World Bank, 2011). This data indicates there are students in every class at OC living with some form of a disability. Providing materials to students in an accessible format ensures students with different life situations and backgrounds have full access to equal learning opportunities.

Open education materials support accessibility in a number of ways. Unlike commercially published materials, OER can be easily adapted to meet accessibility requirements, and the adaptations can reduce duplicate work across institutions. Students are given the choice of format, with open textbooks available both in print or digital formats. Open textbooks have often been designed to work with screen readers, they can be magnified, and content can be created with Universal Design for Learning (UDL) principles. Permissions granted by open licenses remove the legal barriers to adapting and customizing learning resources, making it possible to create more accessible classes for all students enrolled (Thomas, 2018). For example, if a resource is open, a professor could support accessibility by adding subtitles to a video that was previously missing this accessibility feature. Additionally, Thomas (2018) points to the fact that OER can offer instructors the opportunity to include a diverse set of individuals in



the adaptation of materials, including those who identify as disabled, normalizing and reducing stigma while also sharing viewpoints of marginalized individuals.

While the digital nature of online textbooks makes them accessible for students using technologies such as screen readers, some educators and students still prefer learning with physical materials. Often students like to use a print book in order to make notes or highlight content. By offering Print-on-Demand (PoD) at the College, students who prefer online textbooks and print textbooks can both have their needs met. Following course completion, students have the option to keep their textbook for future reference, and students who may not own a given technology or who do not have the computer literacy skills to navigate an online textbook, have equal access to their course materials when offered through a PoD option. Students who have difficulty reading from a screen for long periods of time due to visual impairments, visual processing limitations, and visual focus issues, still have a low-cost alternative to costly textbooks when offered a PoD option.

OER Supports Indigenization

The use of Open Education Resources directly supports the College's efforts to support Indigenous students and the Institution's Indigenization Plan. Reducing barriers to education supports Indigenous students, particularly those living in remote communities who may find it difficult to visit a campus to obtain learning materials or to attend class in-person, as well OER supports students facing financial barriers.

The ability to adapt open education materials creates an opportunity for professors and instructors to include a local context, and ensures Indigenous cultures and histories are respectfully and accurately included in curricula and disciplines. Educators can incorporate the voices of Indigenous peoples and diverse perspectives, more so than what could be included in commercial textbooks that are often developed with a single viewpoint, and published by euro-centric publishing companies.

Lamberta (2018) ties three social justice principles to open education, all of which can be applied to the connection between Indigenization and Open Education Practices:

- **Redistributive Justice:** Open Education Resources are inherently free and provide students who by circumstance of their socio-cultural positions cannot afford traditional course materials, with equal access to learning materials to support their education, and who may under current circumstances be excluded from education, or be more likely to fail or drop-out due to a lack of access to learning materials.
- **Recognitive Justice:** Open Education Resources can ensure more socio-diversity in curriculum, particularly in the form of images, case studies, and knowledge of Indigenous peoples and other marginalized populations, both at the national and regional context level. Including these perspectives in curriculum recognizes more legitimate diverse views and experiences.
- **Representational Justice:** Open Education Resources ensures marginalized people and groups can speak for themselves, and not have their stories told by others. Involving Indigenous people as collaborators of OER ensures their experiences and views have been included in curriculum across disciplines.

Lamberta's (2018) social justice principles also reflect on the fact that many traditional course textbooks and associated digital platform designs have been dominated by white, western, and often colonial frameworks, indicating a lack of diverse perspectives within the commercial textbook market. In fact, a



2020 study found that college biology textbooks overwhelmingly cite white male scientists (Stewart). Including Indigenous voices in the development of OER increases diverse viewpoints as well as writing opportunities for Indigenous authors.

Research on OER

Much research has been invested into the educational value of open education for students and educators, the cost-savings of using OER in courses compared to commercial options, the quality of OER compared to traditional textbooks or course materials, and student outcomes of those enrolled in courses using OER. A highlight of research findings is included below to demonstrate the supporting evidence behind the move to Open Education Resources in place of traditional course materials, such as commercial textbooks.

Importance of Promoting OER Awareness & Garnering Institution-Level Support	
Being involved in an OER project can be a good way to increase the knowledge of OER at an institution, an important consideration if a cultural shift towards openness is a goal.	(Morgan, 2019)
Faculty teaching introductory-level courses were three times as likely to have adopted an OER textbook (47%, compared to 15%) if they were aware of an OER initiative. The ratio among all faculty was four to one (36%, compared to 9%)	(Seaman & Seaman, 2020)
Cost reduction for students was the most influential factor that influenced open textbook adoption for faculty because it increased student access, and students had a preference for using open textbooks in the future because they found them easier to use.	(Petrides et al., 2011)
When implemented at the institutional level, OER initiatives result in a measurable increase in the number of faculty who are aware of OER. Faculty who are aware of OER are much more likely to adopt OER as required course materials; those who have yet to adopt OER are much more likely to do so in the future.	(Seaman & Seaman, 2020)
90% of instructors surveyed thought their students were either equally or more prepared for courses when OER replaced traditional texts	(Bliss et al., 2013)
About 65% of educators surveyed found that open materials provided through OpenStax College made teaching easier, enabled innovation, or changed their pedagogical approach. They also reported greater learner satisfaction amongst students.	(Pitt, 2015)
Quality of OER Resources	
When examining learning outcomes as the measure of success, many OER are equal in quality to commercial textbooks. Metrics such as total page counts or full colour photos are vanity measures, and the one metric that should matter most is learning.	(Wiley, 2013)
Students enrolled in undergraduate psychology courses using OER performed better than those enrolled in the same courses using a commercial textbook.	(Magro & Tabaei, 2020)
Student respondents appreciated that their textbook was customized to the particular course, made possible by the open license attributed to the textbook.	(Hendricks et al., 2017)



Professors using an open textbook agreed things were missing when compared to a commercial textbook, however, the flexibility of the open license allowed the professor to rethink and modify their courses and add supplementary resources.	(Watson et al., 2017)
The majority of student survey respondents perceived the open textbook to be of the same or better quality than commercial textbooks used in other courses.	(Hendricks et al., 2017)
Students' justification of textbook quality was reviewed and they highlighted that their OER text was straightforward, clearly written, more detailed, comprehensive, and easy to understand, well organized, and had a 'personal feel'. Students also appreciated that the open textbook did not have markings that come with a used textbook (such as highlights or ripped pages).	(Magro & Tabaei, 2020)
Questions around OER quality and efficacy have been investigated in both postsecondary and K-12 settings with consistent results that OER can match and sometimes improve upon standard textbook quality and outcomes when evaluated by student performance.	(Kimmons 2015; Kelly & Rutherford, 2017; Chiorescu, 2017; Hunsicker-Walburn et al., 2018; Clinton 2018; Clinton & Kahn, 2019).
Student Outcomes as a Result of Using OER	
The use of OER has been shown to improve student performance, learning, and engagement.	(Lane et al., 2015; Magro & Tabaei, 2020).
There was no difference noted in student outcomes and course grades of those using an OER textbook and a traditional textbook for an introductory nutrition course, and the usage and perception of the OER textbook was higher amongst students. The cost savings were found to be approximately \$127.50/per student. In this case, the OER was focused on the culture and food of the region in which students were located.	(Fialkowski et al., 2020)
Students enrolled in introductory psychology courses at one institution using OER had better scores than those enrolled in classes using traditional textbooks.	(Magro & Tabaei, 2020)
Open Educational Resources result in at least the same amount of learning when compared to a commercial textbook.	(Wiley, 2013)
Students from traditionally underserved populations reported the lower cost of the textbook had a significantly higher impact on their decision to enroll and remain enrolled in the course.	(Hardin et al., 2018)
There was no evidence found that the use of an OER text impeded students' critical thinking compared to the use of a traditional textbook, and the effect was found through improvements from both lowest and highest performing students.	(Hardin et al., 2018)
Student performance of those assigned readings from an OER section was non-inferior to the performance of students in the section who were assigned readings from the traditional textbook, and the OER class did not substantially differ from the standard textbook class in terms of student	(Allen, G., et al., 2015)



learning outcomes. The two comparison classes were similar in their beliefs about chemistry and overall study time, indicating the OER was a viable cost-saving alternative to traditional textbooks.	
Faculty were found to be engaging more with course materials because of the transportable format of an open textbook, the fact that all students had access to the text, and because students had access to the textbook before the course began.	(Magro & Tabaei, 2020)
68% of faculty surveyed perceived students were equally prepared for their course using open textbooks compared to using traditional textbooks, while an additional 20% of faculty thought their students were more prepared when using open textbooks.	(Jung et al., 2017)
The number of students who withdrew from their introductory psychology courses was substantially higher in the semester with a commercial textbook compared to the semester with an open-source textbook.	(Clinton, 2018)
The completion rate for students taking an introductory sociology course and using an OER had a completion rate that was 5% higher than students in the course using a commercial textbook.	(Ross et al., 2018)
Students who used an open web-based homework system in post-secondary calculus accessed their homework earlier in the semester, and final grades were not significantly different between courses with OER and closed educational resources.	(Kersey, 2019)
Students reported reading the OER more than the commercial textbook when comparing two sections of an introduction to art class, and more than 70% of students indicated that their decision to enroll in a course would be influenced by the cost of a textbook.	(Jones & Nyland, 2020)
The pass rates of students in a basic math course increased by 5.3% when all courses were taught with OER, and those enrolled in the OER versions of a reading course performed better than peers enrolled in the same course that was not using OER materials.	(Pawlyshyn et al., 2013)
A significant difference was found between students enrolled in courses utilizing OER. Those students on average took 1.5-2 credits more than those in control groups.	(Fischer et al., 2015)
Students using open textbooks took slightly more credits than students using traditional textbooks.	(Robinson, 2015)
OER adoption was explored in a college level algebra class and it was discovered that fewer students withdrew from the course when OER were implemented.	(Chiorescu, 2017)
Students enrolled in courses with open textbooks had a 29% lower withdrawal rate than students enrolled in courses using commercial textbooks.	(Clinton & Khan, 2019)
A study that looked at the use of student-created OER as a method to improve student performance examined student-created video tutorials, chapter summaries, and games to review content, which were used in current and later versions of the course. Across a number of semesters and 181 students, average grades on student assignments rose considerably when these student-created OER were added to the course, demonstrating the value of student engagement with OER content.	(Wiley et al., 2017)



Researchers looked at the final grade outcomes of students, as well as students from certain sub-populations. OER adoption resulted in a 2.1-4.4% reduction in DFW grades (the percentage of drop/fail/withdrawal rates of a course). White students' grades increased by 7.1% on average, while non-white students saw a 13.1% increase in average grades. As well, grades improved by 3.2% for full-time students, but jumped an impressive 28.1% for part-time students.	(Colvard et al., 2018)
Cost Savings Research	
Students from traditionally underserved populations, such as first generation college students and ethnic minorities, reported more negative consequences due to textbook costs, such as dropping a class, choosing not to register in a certain course, or having worse grades because they were not able to afford a textbook.	(Nesbaum et al., 2020)
The cost savings for students enrolled in 14 sections of an institution's US history course, was estimated to be approximately \$109,548. As well, these researchers found a theme of gratitude amongst students, students were grateful for day-one access to course materials without a cost.	(Beile et al., 2020)
A full-time post-secondary student spends more than \$900 on textbooks each year.	(Hilton et al., 2014)
The Government of Canada estimates students should expect to spent between \$800 and \$1000 per year on textbooks.	(Government of Canada, 2018)
The average cost of required textbooks <i>that were never used</i> in students' classes ranged from \$214-\$298.	(Jhangiani & Jhangiani, 2017)
Three UBC professors found that student savings by using an open textbook were accompanied by little change in learning outcomes. The researchers also found that the OER adoption for their students saved approximately \$85,000 over the course of a year.	(Hendricks et al., 2017)
The negative impact of textbook costs is disproportionately on the shoulders of students from economically disadvantaged backgrounds, including students with student loan debt and those working more hours per week than other students.	(Jhangiani & Jhangiani, 2017)
Professors who taught an introductory Sociology course at the University of Saskatchewan found that 83% of the students would <i>not</i> have preferred purchasing a traditional textbook, and one of the features students preferred the most was that there was no cost associated with the text.	(Ross et al., 2018)
A majority of student survey respondents said they chose to purchase textbooks from sources other than campus bookstores, indicating that bookstore revenue is not necessarily hurt as a result of open textbook adoptions.	(Jhangiani & Jhangiani, 2017)
When a textbook is too expensive, it affects student success: 54% don't purchase the required text, 30% earn a lower grade, 37% take fewer courses, 26% don't register for a specific course, and 17% drop or withdraw from a course.	(Jhangiani, & Jhangiani, 2017)
Researchers surveyed students on what they <i>did</i> with the money saved by not needing to buy textbooks. 42.2% claimed that they reinvested in their education, 30.5% said they applied it towards daily expenses, and 20.3% said they saved the money. 'Spent the money anyways' (6.3%), 'I don't purchase	(Ikahihifo et al., 2017)



my own textbooks' (2.9%), or 'leisure' (0.97%), were not highly reported ways to spend the cost savings.



IMPACT OF TEXTBOOK COSTS ON STUDENT PROGRESS

The high cost of textbooks is negatively impacting students' academic progress.

How are they coping?*



"Infographic: Impact of Student Textbook Costs on Student Progress" by Florida Virtual Campus Office of Distance Learning & Student Services, 2018. Licensed under CC BY 4.0.

Okanagan College's OER and Copyright Survey Results

In April 2021 OC Library, in collaboration with the Department of Institutional Research (IR), surveyed faculty and vocational instructors to gain a better understanding of attitudes towards and uses of copyrighted and Open Educational Resources at the College. The survey response rate was 24% (148 responses out of 616 invitations), with respondents from the Business and Adult Upgrading departments collectively representing 25% of total respondents. The majority of respondents self-identified as 'continuing/regular' employees (86%). See Appendix F for the full summary report.

Key survey highlights:

- Over the last two years, nearly half of all respondents used a combination of online learning materials, including library materials or content available on the Internet, with no commercial textbook required for their courses.
- 48% of respondents indicated an open textbook or other Open Educational Resources were used as an assigned text. However, this figure seems very high based on informal discussions with faculty and staff outside of this survey, and based on the OER tracking conducted internally at the College. It is possible respondents are confusing OER with resources freely available on the Internet.
- The most common barrier to adopting OERs was that they were unavailable for a given course (34% of respondents), while the second most common barrier was that OERs did not include support/ancillary resources (28%). These barriers are commonly identified in the research on OER, and indicate the need to have local OC staff who can assist with finding and identifying open resources for faculty and instructors, as well as the need to provide educators with time to



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develop their own open materials. 27% of survey respondents reported that not having time to adapt their course to use OERs was a barrier to adopting, which speaks to the need for support in terms of faculty/instructor time release or additional staffing to support curriculum development specific to the area of open education.

- Nearly two-thirds of respondents (62%) had a positive perception of OERs, and nearly half of all respondents (49%) said they were extremely likely to use OERs, zero-cost, or low-cost course materials in the future. This is positive news, but also means the College has work to do to try and attract the other half of respondents to use OER or zero-cost course materials.
- While nearly all respondents (86%) used Moodle as a way of sharing course materials with students, only 8% had utilized a Talis reading list, which could lead to challenges in managing copyrighted materials if this trend continues.

Designing, Adopting, and Utilizing OER at Okanagan College

OER Quality Assurance

Faculty and instructors are recognized as the subject matter experts for content. It is expected they will select, adapt and create quality OER that support course learning outcomes/objectives. Faculty and instructors can follow outlines and evaluation rubrics available through BCcampus and other sources to evaluate OER and the effectiveness of Open Education Practices. See Appendix A for an example evaluation rubric.

Ownership and Sharing

Okanagan College is committed to making use of Open Education Resources in accordance with relevant OC policies, and rights and obligations outlined in Collective Agreements.

Sharing of knowledge, ideas, and active collaboration are foundations of education, and Okanagan College is encouraged to openly license its own uniquely created materials whenever possible. The College encourages content creators to license their own learning materials openly with [a Creative Commons attribution license](#), when possible. Educational material creators reserve the right to decide the conditions under which their materials will be shared except under the following conditions:

- The materials were created, in part or in whole, with an open education grant or other financial support that stipulates the materials must be released with an open license;
- The content is paid for or commissioned by the College, or the College provides contribution either financial or material, and in this case the College determines the conditions under which the material will be shared, and prefers to assign an open license;
- The content is developed as a result of a particular collaboration, in which case copyright and licensing should be decided upon at the start of the project;
- The materials include third-party content used with permission from the copyright holder, or another form of license that is not compatible with Creative Commons or Fair Dealing copyright laws.

Responsibilities of OER Creators or Owners

Faculty or instructors who incorporate OER materials into courses should understand that they assume responsibility for maintaining the content. When content is adapted, reused, or distributed under a [Creative Commons license](#), that license must be adhered to and it is the responsibility of the



faculty/instructor and their students to ensure they have reviewed the license and have the rights necessary to publish or adapt the content. All resources published must comply with relevant institutional policies and collective agreements, such as copyright and intellectual property laws, accessibility policies or guidelines, etc.

Faculty and instructors creating open content are encouraged to assign a Creative Commons license on the resource before or at the time it is introduced to a course. Individuals working as a group and collaborating with others on materials are advised to discuss licensing at the beginning of a project to ensure all group members are in agreement as to how their work will be shared and licensed.

Technical Formats of Open Materials

Open Education Resources can take many forms and be created in many formats. Consider the adaptability of materials when making formats available. For example, PDFs are easy to read but can be difficult to edit without specialized software. Contributors should be encouraged to supply OER source-files in an editable format. For example, consider making available a static copy in PDF format, as well as an editable format, such as MS Word or a GoogleDoc file.

Other file formats that could be supported may include MPEG audio, WAV, GIF, JPEG, PNG, TIFF, HTML, plain text, Rich Text, XML, CSV, and tab-separated values.

Other file formats are supported but may be limited in full functionality due to software requirements. For example, Microsoft Word, Excel, PowerPoint, Project, and Visio, WordPerfect, Photoshop, BMP, and QuickTime Video.

If OER were created as part of an activity that was funded externally, such as through a grant, the storage and/or repository locations or requirements outlined as a condition of the funding or grant should be adhered to.

Licensing

Faculty, instructors, and staff are encouraged to publish their materials using a [Creative Commons attribution license](#), and select a license that both suits their academic freedoms and is also the least restrictive, as appropriate.

When an individual creates and publishes an open resource and incorporates open material from other creators, the copyright owner(s) and/or author(s), date (if known), and a Creative Commons attribution license must be visibly attributed.

Okanagan College's policies on intellectual property and Collective Agreements must be adhered to. Staff and students must comply with the terms of use of applied licenses.

As is normally outlined in grants facilitated or obtained through BCcampus or other agencies, all educational resources and knowledge produced through these funding sources, will carry a Creative Commons Attribution License, or another open license.

Potential Outreach & Communication Strategy

It is recommended that the approach to outreach and communication be tailored to specific audiences. Specifically, college administrators and the Executive, faculty and instructors, students, and staff. The same points can be presented, but the particular OER benefits that speak to each audience should be



highlighted. The points outlined below are supported by numerous studies presented in the research section of this report.

For Administrators (Including the College Executive, Directors, and Deans):

There are many benefits to creating and adopting Open Education Resources and Practices:

- Many studies show using OER in courses improves student learning outcomes compared to traditional textbooks;
- The quality of OER is high, with many sources using a peer-review model to ensure quality control and to help educators select high-quality resources;
- The ability to remix, adapt, and share resources means that material can be customized for regional contexts, accessibility needs, or designed with Universal Design for Learning (UDL) principles;
- OER supports contributions from diverse perspectives and multiple authors, and provides opportunities for including traditionally marginalized voices, such as Indigenous authors;
- British Columbia is a leader in the adoption of Open Education Resources, however, Okanagan College is beginning to fall behind other institutions;
- Students can become more engaged by participating in the development and adaption of OER. This can be engaging and motivating and also support learner-centred teaching and learning.

Drawbacks of traditional textbooks:

- The cost of commercial or traditional course materials can be a barrier for students;
- Students often express gratitude when they have access to Open Education Resources compared to traditional course textbooks;
- Textbooks can become outdated quickly and do not always represent diverse experiences or views.

Incentives for faculty and instructors to create or adopt OER:

- Assurance that all students have equal access to course materials;
- Availability of grants through organizations such as BCcampus to develop open course materials;
- Opportunity for faculty and instructors to engage in scholarly practices by developing Open Education Resources;
- Monetary incentives from BCcampus for faculty and instructors to review open textbooks.

Faculty, Instructors & Staff:

Pedagogical benefits of creating and adopting OER:

- Expands access to information, all students have access to required course materials before the first day of classes, and after a course ends;
- Research suggests students do as well or better in courses using OER textbooks and course materials, possibly due to the fact that all students have access to the course materials from the first day of classes;
- Offers the opportunity to supplement content already available for a course;
- Increases access to content that may not be available through licensed subscriptions or copyrighted materials;



- Creates opportunities to include marginalized or oppressed voices into curriculum, such as minorities or Indigenous populations, which are often missing from mainstream course textbooks;
- Students can become more engaged with course content by having the ability to contribute to an OER;
- All campus departments can have access to the learning materials needed to support a student for a given course, for example Learning Centre Coordinators, tutors, librarians, and Aboriginal Centre Coordinators.

Financial Benefits of creating and adopting OER:

- Students save money;
- Ensures equal access to course materials;
- Increases retention of students;
- Opportunities to receive grants to develop, adapt, or review OER;
- Improves reputation of faculty by authoring OER and sharing content across one's discipline and even into other disciplines;
- Creates connections across departments, and within and across institutions, when working towards the shared goal of OER for all students;
- Ability to share authoritative materials across institutions for use by colleagues.

Students:

Benefits of advocacy through students and student organizations:

- Advocating for no cost or reduced textbook and course materials costs will help communicate the importance;
- Digital class materials that can optionally be printed are more convenient and transportable than traditional print textbooks;
- OER provides equal access to education for all students;
- OER education provides an opportunity to educate students on publishing models, licensing, and copyright of intellectual property.

Benefits in coursework:

- Low or no-cost course materials means more equitable access for fellow students;
- Digital access means increased convenience and transportability;
- OER can include more diverse perspectives and voices than commercial course materials;
- The use of OER promotes student engagement and critical thinking skills by having the opportunity to contribute to the adaptation of open course materials.

Conclusion

Okanagan College encourages all faculty, instructors, and staff to support the use, adaptation, and development of Open Education Resources. From the pedagogical advantages for faculty and instructors, to the reduced barriers to education for all students, to the possibilities for improved student outcomes, there are many reasons for supporting educators to move to Open Education Practices.



There is no evidence of enhanced course performance or benefits to achieving learning outcomes as a result of college students paying upwards of \$1000 per year on textbooks, therefore one must question what exactly is being purchased with that \$1000, other than a commercial textbook that will soon be outdated or superseded by a newer edition (Hilton, 2016).

Through the support of the Library, Learning and Applied Research, and the Open Education Working Group, Okanagan College can continue to grow its OER adoption rates, and encourage faculty and instructors to make the transition to open. As Open Education Practices gain momentum at the College, student outcomes can improve, barriers to education can be reduced, OC students can get a more affordable education, Indigenous and marginalized students can be better supported, and all areas and levels of the College can demonstrate their dedication to student success.



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Appendices

Appendix A: Sample OER Rubric

- Used to guide professors and instructors through their evaluation of an OER
- Certain questions may or may not be applicable

	Excellent (3)	Sufficient (2)	Insufficient or Weak (1 or 0)
<p>Relevance:</p> <ul style="list-style-type: none"> • Does the OER directly address at least one course learning outcome? • Is the content up-to-date and written in such a way that the OER has a long shelf life? • Does the content and writing level of the resource meet the needs of the intended audience? • Does the resource meet the needs of your intended use? (i.e., an in-class resource, a group resource) 			
<p>Quality:</p> <ul style="list-style-type: none"> • Is this OER of a similar high quality to any commercially-produced item you might have considered? • Is the OER’s information clear? • Is the layout attractive and easy to navigate? Does it encourage use? • Is the writing level acceptable? e.g., appropriate vocabulary level with few/no spelling errors, typographic errors, formatting errors, or grammatical errors 			
<p>Modularity:</p> <ul style="list-style-type: none"> • Does this OER resource lend itself to being used in smaller, modular “chunks” of content? • Will rearrangement of the OER’s content, “chunking” content, or removing any “signposts” such as heading, subheadings, or point form, present difficulty for the intended readers? 			
<p>Accessibility (devices):</p> <ul style="list-style-type: none"> • Is the OER resource available in alternative formats (e.g., .doc, .pdf, .epub)? • Can this resource be viewed on mobile devices? (Check with Educational Technology Coordinators for assistance) • Do audio or video resources have written transcripts or subtitles? 			
Accessibility (Additional learning requirements):			



<ul style="list-style-type: none"> • Can this resource be used by students who need adaptive technology to use it? (Check with Accessibility Services for assistance) • If conversion is required before use, can the resource be easily and quickly converted for a reasonable cost? 			
<p>Inclusivity:</p> <ul style="list-style-type: none"> • Do images (photographs, videos, art work, or graphics) represent peoples from different cultures, including Indigenous cultures? • Are references and examples related to peoples from different cultures, including Indigenous cultures, culturally sensitive, fair, accurate, and respectful? • Do images within the OER reflect diversity (ethnicities, genders, ages, able-ness, etc.)? • Is the language inclusive (i.e., She/he or they)? 			
<p>Technical Requirements & Interface:</p> <ul style="list-style-type: none"> • Is the text free of interface issues (navigation problems, poorly-displayed images) that may distract readers? • Are any technical requirements (i.e., specific software) readily available without causing additional costs to the user? 			
<p>Future Proofing:</p> <ul style="list-style-type: none"> • Is this resource built in such a way that the software it uses won't become obsolete? (Check with the College's Educational Technology Coordinators for assistance) 			
<p>Interactivity & Engagement:</p> <ul style="list-style-type: none"> • If appropriate, does the resource encourage active learning? • Does the resource provide learners with opportunities to test their knowledge of the material? (i.e., self-tests, H5P activities, etc.) 			
<p>Licensing:</p> <ul style="list-style-type: none"> • Does the OER's license permit education reuse? • Does the OER's license permit modifications or adaptations of the materials? • Are you obliged, under the OER's license, to share the adapted material back to the Creative Commons? 			
<p>Accuracy & Peer Review:</p> <ul style="list-style-type: none"> • Is the OER's information accurate and up-to-date? • Do the authors have expertise or credentials in this field? • Has this OER undergone any peer review? 			



• If so, was the review(s) positive?			
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Comments & Overall Evaluation:



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Appendix B: Print-on-Demand Tracking Information

Further information about Print-on-Demand can be found in the BCcampus [Print on Demand Guide](#).

Print-on-Demand (PoD) services for open textbooks aim to provide students and educators with an option for low-cost access to print copies of open textbooks. PoD is a service or process by which individual copies of a textbook or other resource that is usually available as a digital file can be printed upon request (Aesoph, n.d.).

It is recommended that the planning and undertaking of a PoD service at OC is managed by the Bookstore, in collaboration with the College's Open Education Working Group, the Library, and possibly OC Print Services. It should be noted that openly licensed books released with non-commercial licensing provisions do not allow books to be sold for profit, and can only be sold to recoup costs.

Tracking & Assessment of PoD

Date	Item	Course Name & Number	Title of Text	Quantity	Assessment & Notes
	Orders by students				
	Orders by faculty/instructors				
	Bulk pre-orders by faculty/instructors				
	Bookstore inventory/sales				<i>How many printed books were pre-ordered by instructors? How well did they sell? Were there open textbooks not available in print that students requested?</i>
	Inquires about the service				<i>Who asked: prospective students, current students, faculty, staff? How were these inquiries made: in person, phone, email, contact form, social media?</i>
	Complaints				<i>Should a FAQ be added?</i>



	Website Metrics				<i>How many visits? How many uncompleted orders?</i>
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From the BCcampus Open Education *Print-on-Demand Guide*



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Appendix C: UBC Okanagan Policy O-131.2: *Digital Assessment Tools*



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25 February 2021

To: Okanagan Senate

From: Okanagan Academic Policy Committee

Re: Policy O-131.2: *Digital Assessment Tools*

At its 23 July 2020 meeting, the Okanagan Senate approved Policy O-131: *Digital Assessment Tools*. There was no formal consultation on the policy as it was crafted on an emergency basis to provide adequate time for faculty to make appropriate arrangements to comply with the policy for 2020 Winter Term 1. The policy was drafted with a sunset clause limiting its application to 2020 Winter Term 1.

At its 29 October 2020 meeting, Senate approved an extension to Policy O-131 to 31 August 2021 to allow the Academic Policy Committee to undertake formal consultation with the goal of creating a permanent Digital Assessment Tools policy.

The Committee's consultation process is now complete. The consultation request was sent out on December 21, 2020 to 437 addresses - all faculty; Deans; CTL; bookstore and library - with a 29-day reply period.

Twenty-six (26) responses were received.

Five (5) responses were positive with a straightforward "I support the policy."

Twenty-one (21) responses provided detailed commentary, some positive, some negative.

The Committee considered the feedback received in preparing the proposed Policy O-131.2 and recommends the following:

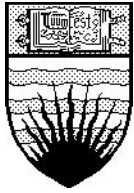
Motion:

"That Senate approve Policy O-131.2: Digital Assessment Tools, as attached."

Respectfully submitted,

Dr. Jan Cioe, Chair
Senate Academic Policy Committee

THE UNIVERSITY OF BRITISH COLUMBIA



SENATE POLICY:
O-131.2

OKANAGAN SENATE
c/o Enrolment Services
2016 - 1874 East Mall
Vancouver, B.C. Canada V6T 1Z1

Number & Title

O-131.2: *Digital Assessment Tools*

Effective Date:

September 1, 2021

Approval Date:

February 2021 (anticipated)

Review Date:

The policy will be reviewed by the *responsible committee* two (2) years after approval and thereafter as deemed necessary by the *responsible committee*.

Responsible Committee:

Okanagan Senate Academic Policy

Authority:

University Act, S. 37(1)

“The academic governance of the university is vested in the senate and it has the following powers:

... (d) to determine the conditions under which candidates must be received for examination, to appoint examiners and to determine the conduct and results of all examinations.

Purpose and Goals:

This policy is designed to:

- 1) Ensure that all student assessment is included in the cost of tuition.
- 2) Provide a degree of financial protection for students.

Applicability:

- 1) This policy is applicable to all compulsory, non-tuition, non-textbook *Digital Assessment Tools*, for which the student purchases access to said *Digital Assessment Tool*.
- 2) This policy is applicable to all UBC Okanagan undergraduate and graduate courses, consecutive courses, and full-year courses.

Exclusions:

This policy does not apply to:

- 1) Non-fee-based *Digital Assessment Tools* that are either freely available or centrally funded by UBC;
- 2) Textbooks in any format;
- 3) Computer hardware and other technological costs, including internet access;
- 4) Non-digital costs, including laboratory materials and off-campus learning opportunities; and
- 5) Exemptions as granted by the relevant Dean as outlined in Sections 3 and 4 below.

Definitions:

For the purposes of this policy:

- *Centrally-funded* means paid by UBC or Units/Departments therein, where students have access to the resource without paying an additional non-tuitionary fee.
- *Digital* means non-physical; including electronic, web-based, online, and similar terminology.
- *Digital Assessment Tool* means web-based platforms used to assess students using modalities including, but not limited to, questions, assignment submissions, quizzes, exams, and similar activities intended to assess students.

- *Bundled Resources* are products sold for one price that includes access to a *Digital Assessment Tool* in addition to one or more additional resource(s), typically textbooks or e-textbooks.

Policy:

- 1) No student shall be required to purchase access to a fee-based *Digital Assessment Tool*, including those sold as a *Bundled Resource*, for any UBC Okanagan course.
- 2) *Digital Assessment Tools* may not be used for practice/mock questions, quizzes, or similar activities, including cases in which the activity does not directly count towards a student's grade.
- 3) The relevant Dean may grant an exemption to Sections 1-2 above on a case-by-case basis for a course upon appeal by the instructor for pedagogical reasons. Such exemptions must be reported to the Senate Academic Policy Committee on an annual basis by the responsible Dean.
 - a) Instructors requesting such an exemption must normally do so no later than two (2) months before the start of the term in which the *Digital Assessment Tool* is to be used.
 - b) When an exemption is granted, the cost of the *Digital Assessment Tool* may not exceed 12% of the domestic tuition for a 3-credit course and the weighting of assessment performed via the *Digital Assessment Tool* may not exceed 15% of the students' overall course grade.
- 4) The relevant Dean may grant an exemption to Sections 1-2 above on a case-by-case basis for a program upon appeal by the program Head or Coordinator for pedagogical reasons. Such exemptions must be reported to the Senate Academic Policy Committee on an annual basis by the responsible Dean.
 - a) Programs requesting such an exemption must normally do so no later than two (2) months before the start of the term in which the *Digital Assessment Tool* is to be used. When an exemption is granted, the program may use the *Digital Assessment Tool* for four (4) years before reapplying for an exemption.

Calendar Statement:

There will be a calendar statement under this policy.

Consultations

The following groups were invited to provide comments during the development of this policy:

All Faculty; Bookstore; Library; Centre for Teaching and Learning.

History:

This is the second version of this policy.

Version 1 – in effect September 1, 2020 to August 31, 2021.

Related Policies:

There are no related policies.

Appendix:

There is no appendix to this policy.

Procedures:

There are no procedures for this policy.

Memo: O-131 Digital Assessment Tools

Prepared by

Ms. Kristen Morgan
Senator At-Large
Student Senate Caucus Chair

Prepared for

UBC Senate of the Okanagan
Revised 17 December 2020

Background

This policy is rooted in the core belief that all assessment should be included in the cost of tuition. While UBC centrally-funds several technologies that can be used to assess students (Canvas, iClicker Cloud, TurnItIn, etc), some instructors have historically opted-in to using Digital Assessment Tools (DAT) largely created and owned by textbook publishing companies. It's important to acknowledge there exists a wide variety of reasons instructors may choose to use DATs- foremost among them being the challenge of handling marking traditional assignments for large classes, especially with limited access to TA resources. These DAT are frequently referred to as 'online homework systems' or simply by their brand name (Mastering, Sapling, Wiley Plus, etc).

While DAT may provide a simple solution to a common problem, they are not without their financial hardship to students. Digital Assessment tools frequently cost \$50-\$120 and are non-transferable/resaleable between students, kneecapping their ability to recoup a portion of the cost as might be done with traditional learning materials like physical textbooks. DATs are most frequently used in 100-level courses, causing situations in which students must access for up to five Digital Assessment Tools per semester.

Passing this policy protects the financial interest of students while supporting the stated position of UBC's administration, faculty members, and support staff regarding equitable access to all forms of digital learning technologies.

Policy History

An initial version of this policy was passed by Senate at the July 2020 meeting, originally effective until 31 December 2020 (now extended to 31 August 2021). In summary, the initial policy capped the price of each DAT to \$65 and 15% of a student's overall grade. Largely due to the urgency associated with the shift to remote reaching for the 2020W session, this policy was passed on an expedited basis and without formal consultation, with the understanding that it would be revised and expanded at a later date.

Non-Tuition Expenses

The UBC Okanagan Students' Union conducted a *2019W Student Experience Survey* to collect data on students' non-tuition academic costs. While these numbers include textbooks, we would like to highlight that 48% of students reported being assessed 'frequently' via [DAT] requiring paid access codes. Additionally, a majority of students reported 'frequently' or 'sometimes' illegally accessing course resources from online sources (27.76% and 24.79%, respectively).

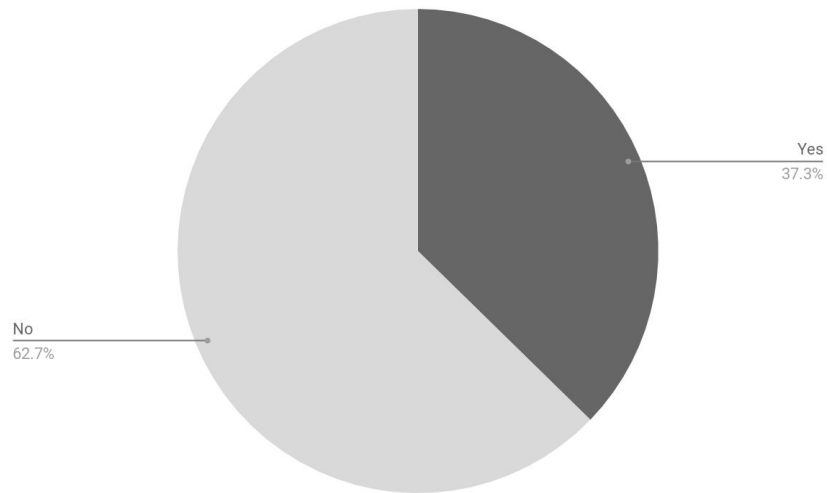


Figure 1: Would you say your financial situation ever hindered your education? n=829

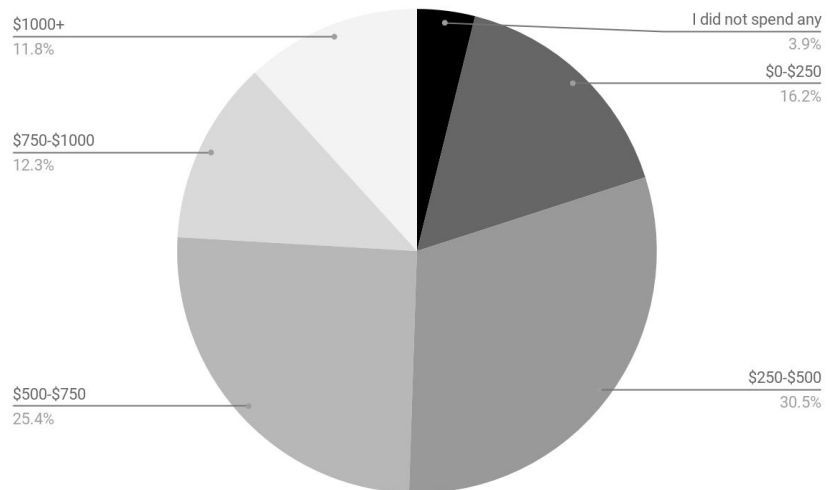


Figure 2: Based on your best estimate, how much in total have you spent on textbooks and other course resources (excluding tuition) during the 2019-2020 academic year? n=847

Breakdown of Proposed Policy

The proposed updates expand the initial policy's reach, while further clarifying inclusions and exclusions. If approved, all fee-based Digital Assessment Tools would be disallowed from use at UBCO, except for cases in which an exemption is granted (see below). This policy also does not impact technological costs (hardware, internet access, etc), nor does it apply to physical expenses (lab coats, field trip fees, etc). As UBC began centrally-funding iClicker Cloud in September 2020, it is also not impacted by this proposal. Further discussion would be required if, in the future, UBC decides to stop centrally-funding iClicker technologies and shifts the direct cost burden back to students.

Requesting an Exemption

Instructors may request an exemption to this policy by appealing to the Dean of their Faculty no less than two months before the start of the term in which the Digital Assessment Tool is requesting to be used. In such a case that an exemption is granted, two conditions apply,

- a) The DAT may not exceed \$65 and 15% of a student's overall grade,
- b) Instructors must offer a secondary grading scheme in which students may chose to 'opt-out' of purchasing the DAT and have that portion of their overall grade shifted to a different component or replaced by an alternative assessment option.

Such exemptions are discouraged and Deans must submit a summary report of granted exemptions to the Senate Academic Policy Committee, for information.

In Summary

Fundamentally, we believe that all assessments should be included in tuition. By approving these proposed updates to *O-131 Digital Assessment Tools*, the UBC Senate of the Okanagan signifies its intention to provide a degree of financial protection to students while still offering reasonable exemptions for appropriate situations.

We eagerly await a fulsome discussion on this topic and welcome any questions that may arise during this process of consultation.

Appendix D: BCcampus Institution Inventory



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20 Questions To Ask About Open Education

Institution Name: _____

Institutional Values

1. Is there language in this institution's strategic plan that can be tied to Open Education (OE)?
2. Is OE considered innovative at this institution?

Recorded Response:

Institutional Knowledge

3. If a survey was taken at this institution, would half the faculty be aware of OE?
4. If a survey was taken at this institution, can one quarter of faculty identify multiple types of OE?
5. Does this institution have at least one professional development opportunity per year in OE?

Institutional Support

6. Has a senior leader (Director & above) at this institution publicly spoken in support of OE?
7. Is there at least one vocal OE champion at this institution?
8. Is the bookstore at this institution supportive of OE?

Institutional Action

9. Does this institution have an OE Working Group?
10. Does the OE Working Group at this institution include a senior leader who can advocate at the VP level and higher?
11. Does the OE Working Group at this institution include a member who can advocate at the board of governors?
12. Does the OE Working Group at this institution includes students?

20 Questions To Ask About Open Education

Institutional Action (continued)

- 13. Does the OE Working group at this institution work closely with students?
- 14. Is there someone on staff (.5 or more) at this institution that can assist with OE?
- 15. Does this institution have an OE grant program?
- 16. Have one or more faculty at this institution adopted OE?
- 17. Have one or more faculty at this institution adapted or created or contributed to OE?
- 18. Have one or more faculty or staff at this institution conducted research in OE?

Recorded Response:

Institutional Policy

- 19. Is OE part of the instructional design / course approval process at this institution?
- 20. Is OE part of this institution's mandate letter?

Other Notes/Comments

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Inventory completed by:

Appendix E: Example of Board of Governors Policy & Procedure to encourage the adoption, adaptation, and creation of Open Education Resources.



Section:	Academic/Student (AC)
Subject:	Programs and Curriculum
Legislation:	
Effective:	May 31, 2018
Revision:	

APPROVED: _____
Chair, on Behalf of SAIT's Board of Governors

POLICY

The policy of the Board of Governors is to encourage the adoption, adaptation, and creation of Open Educational Resources.

POLICY/PROCEDURE REFERENCE

AC.2.21.1 Open Educational Resources procedure

The official controlled version of this document is held in the Board of Governors Office.

Section:	Academic / Student (AC)
Subject:	Programs and Curriculum
Legislation:	
Effective:	May 31, 2018
Revision:	November 13, 2018

APPROVED: _____
President and CEO

POLICY

The policy of the Board of Governors is to encourage the adoption, adaptation, and creation of Open Educational Resources.

PROCEDURE

DEFINITIONS

Commercial use	Materials that will be offered for sale or licence and that are intended to generate sales revenues or royalties.
Copyright	The exclusive right of the copyright owner to reproduce, scan, distribute, perform, publish, adapt, translate and otherwise control the copyright-protected work. Copyright is recognized internationally, but different countries protect it to different levels.

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Copyrighted works

Original literary, dramatic, scientific, musical or artistic works, or sound recordings. These include, without limitation, published and unpublished works, including books, textbooks, articles, software content and computer programs, CDs, DVDs, source codes, data, forms, compilations, pamphlets, lectures, brochures, advertising, manuals, charts, maps, circuit boards, feature films, documentaries, video clips, film trailers, sound recordings, drawings, cartoons, manuscripts, blueprints, architectural plans, photographs, music, and art works. These can be either SAIT-created or externally-created.

Creative Commons (CC)

An organization that provides a system of free copyright licences, as a standardized way to allow copyright owners to give the public permission to share and use copyrighted works on conditions chosen by the owners.

Creative Commons Licences

A suite of free, open copyright licences that Creative Commons provides and that enable copyright owners to choose the conditions by which their creations may be shared and used by the public. There are various types of CC licences and their terms of use are governed by the type of licence issued to the user.

Open content

For the purpose of this procedure, this term has the same meaning as Open Educational Resource or public domain materials.

Open Educational Resources (OERs)

Teaching, learning, and research resources created with the intention of being freely available to users anywhere to use, reuse, adapt, and share without charge. Examples include but are not limited to online videos, source codes, photographs, graphics, schematics, simulations, data sets, print and e-books, print and e-work books, print and e-articles, e-labs, test banks, supporting assignments and rubrics.

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Open licence

A standardized way for copyright owners to grant permission for access, use and distribution of their copyrighted works, subject to stated restrictions to accessing, using, repurposing, reusing or redistributing creative works. Creative Commons licences are one form of open licence.

Public domain

Information and/or materials that are not protected by copyright, because either the term of copyright protection has expired or the copyright owner has waived copyright protection.

GOVERNING PRINCIPLES

1. An essential foundation of quality education is sharing knowledge and ideas. SAIT therefore encourages its students, instructors, subject-matter experts and instructional designers to make use of Open Educational Resources in order to:
 - a) Increase student success, through increased access to and affordability of resources.
 - b) Improve teaching efficiency and effectiveness, through the ability to focus, analyze, augment and evolve course materials directly aligned to program and course learning outcomes.
 - c) Increase excellence and innovation in curriculum development, teaching and learning while decreasing curriculum costs.
 - d) Enhance SAIT's reputation.
2. Open Educational Resources are governed by the "5 R" principles:
 - a) Retain: An individual or an institution may make and own copies of the OER it created, but the object is still shareable under a specific open licence.
 - b) Reuse: The OER's content can be reused in other ways and without limitations.
 - c) Revise: The OER's content can be revised, adapted, and/or modified to meet the institution's needs.

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- d) Remix: The content of two or more OERs can be revised and combined in new and creative ways.
 - e) Redistribute: New, revised, adapted, and modified OERs must be shared back to the public under the open licence, which in most cases will be Creative Commons.
3. The selection, modification and/or creation of an OER is appropriate where it is of equal or better quality than that of commercially-distributed content and where it supports program and course learning outcomes. See Schedule A OER Selection Rubric, an Associated Document to this procedure.
 4. A curriculum project proposal will include OER evaluation as part of the proposal.
 5. Any material that is published under an appropriate Creative Commons licence or in the public domain may be considered for use in a SAIT course. For more information, refer to the Creative Commons website at <https://creativecommons.org/licenses/>. SAIT's copyright officer and librarians can also provide assistance in this regard.
 6. SAIT students may print OERs for their own individual use, and instructors and employees may arrange for the printing of OERs as an activity ancillary to education, research or study purposes. However, any such printing or distribution cannot be for monetary gain. Any sale or other commercial use of OERs is a violation of non-commercial use licence restrictions and is prohibited.

PROCEDURE

A. Training and Support

1. SAIT's Reg Erhardt Library, the Center for Learning and Teaching in the Learner and Academic Services department, and SAIT's copyright officer are responsible for training SAIT employees in selecting, evaluating and using OERs.
2. SAIT's librarians play a central role in assisting instructors, subject-matter experts, academic chairs/coordinators, and curriculum specialists to locate suitable OERs.

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3. SAIT's academic chairs/coordinators and curriculum specialists play a central role in assisting instructors, subject-matter experts, and instructional designers to adopt, adapt, or create suitable OERs.

B. Selection of OERs

1. The selection of OERs includes adopting existing OERs verbatim, adapting existing OERs, and sharing the adapted learning object back to the OER community, usually through Creative Commons.
2. Instructors, subject-matter experts, and instructional designers who are adopting existing OERs verbatim are responsible for completing licensing documentation as required and applying the appropriate open licence and complying with its terms.
3. Instructors, subject-matter experts, and instructional designers who are adapting existing OERs are responsible for completing licensing documentation as required, modifying the existing learning objects, applying and complying with the appropriate open licence, and sharing back to the OER community as applicable.
4. Content creators (which may include instructors, subject-matter experts and curriculum specialists) and their academic chairs/coordinators must ensure that they have the necessary rights to publish an OER and that all resources published comply with all relevant SAIT policies and procedures and with any applicable agreements created between SAIT and external partners.
5. Any OER that SAIT adopts must either be accessible to all students or must be adapted so that it is accessible to all students.

C. Creation of OERs

1. Creation includes adapting existing SAIT learning objects or creating original SAIT learning objects, licensing those learning objects, and sharing them under an open licence, usually a Creative Commons licence.

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2. The creation and use of OERs is governed by procedure [AC.2.11.1 Intellectual Property](#), and, in the case of students, by procedure [AC.3.10.1 Ownership of Student-Produced Material](#).
3. Where OERs have been developed as a result of a collaboration between SAIT and an external partner, ownership and licensing is governed as per the collaboration agreement.
4. Whenever possible, instructors and subject-matter experts who are creating original content shall assign a Creative Commons attribution licence (the “CC-BY” licence) to their OERs, so that the learning object is accessible by others. The academic chair/coordinator and/or dean/associate dean of the program, in consultation with the instructor, subject-matter expert and other curriculum specialists or copyright specialists, will determine the licensing status for the materials.
5. Instructors, subject-matter experts, and academic chairs/coordinators must be mindful of:
 - a) The current and future technology requirements needed to manage an OER. Since support and accessibility to formats can change over time, instructors and subject-matter experts are encouraged to supply OER source-files in multiple editable formats. Contact SAIT’s multi-media specialists for assistance.
 - b) Accessibility issues around the use of OERs on mobile devices and their use by students with disabilities. Please contact SAIT’s Accessibilities Services unit of the Learner and Academic Services department for assistance.
6. All created materials must be submitted to SAIT’s institutional repository. SAIT’s librarians will assist instructors, subject-matter experts, academic chairs/coordinators and curriculum specialists in this process.
7. Where OERs have been created as part of an external collaboration, any storage and/or repository locations mandated as a requirement of that collaboration agreement should also be used.
8. A created work must acknowledge SAIT in that work.

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D. Maintenance of OERs

1. Instructors, subject-matter experts, academic chairs/coordinators, curriculum specialists and instructional designers will review their OERs on the maintenance cycle established in their school/department to ensure continued relevance and accuracy of content, and replace as required.

ASSOCIATED DOCUMENTS

Schedule A OER Selection Rubric

POLICY/PROCEDURE REFERENCE

AC.2.21 Open Educational Resources policy

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Appendix F: Summary Report on the OC Copyright & OER Survey



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2021 Copyright and Open Educational Resources Survey Summary Report

April – May 2021

The Department of Institutional Research

2021 Copyright and Open Educational Resources Survey

Background

The online 2021 Copyright and Open Educational Resources (OERs) survey was conducted from April 22nd to May 14th, 2021. A total of 616 Okanagan College faculty members were emailed invitations to participate in the survey of which 148 responded, resulting in a response rate of 24 per cent. This response rate indicates that the results of the survey can be generalized within ± 7.0 per cent margin of error range at 95 per cent confidence interval. Following are important points to note.

- Some respondents may not have answered all the questions and therefore the total number of responses vary by question.
- There were some branching questions in the survey resulting in variation of the number of total responses to these questions. Only a sub-group of respondents qualified for these questions.
- Several questions were multiple-response questions where the respondents could select “all that apply”. There was also an option for the respondents to type in “Other” responses for certain questions. Generally, such multiple-response questions are analyzed from two points of view indicating the importance/popularity/mentions by respondents of those choices:
 - The count and percentage of selects of each choice.
 - The percentage of respondents that mentioned a particular choice. Due to multiple selects, the total percentage is higher than 100%. This has been commented on in the Key Highlights section.

A separate MS Excel file has been provided with this report containing the verbatim responses to open ended questions. This file also includes the responses provided by faculty members while responding to the questions that gave them an “other (please explain)” choice.

Key Highlights

- Of the 148 respondents, Business and Adult Upgrading were the only departments with more than 10 respondents (24 and 13 respectively), collectively resulting in 25 per cent of total respondents.
- The majority of respondents described their employment at OC as “Continuing/Regular” (86 per cent).
- Over the last two years, nearly half of all respondents used the following:
 - A combination of online learning materials, including library materials and/or materials available on the internet with no required commercial textbook (49 per cent).
 - An open textbook or other open educational resources as an assigned text (48 per cent).
- Over the last two years, only three per cent of respondents asked students to pay for an industry membership to access materials for the course(s), keeping the course materials cost under \$30 per course.
- The most common barrier respondents had when attempting to adopt Open Educational Resources (OERs) was that OERs were unavailable for their course (34 per cent).
 - The second most common barrier was that OERs did not include support/ancillary resources such as PowerPoints or test banks (28 per cent).
- Nearly half of all respondents were extremely likely to use OERs, zero-cost, or low-cost course materials in the future (49 per cent).

2021 Copyright and Open Educational Resources Survey

- Nearly two-thirds of respondents (62 per cent) had a positive perception of OERs.
- Excluding textbooks, the three most common types of copyrighted works used by faculty were as follows:
 - Videos – YouTube, Vimeo, or other free internet sites (86 per cent).
 - Articles – found online (i.e., freely available newspapers, magazines, or Open Access journals) (71 per cent).
 - Webpages, or reports from websites (i.e., PDF linked from a website) (68 per cent).
- Nearly all respondents (96 per cent) used Moodle as a way of regularly sharing course materials with their students, while only eight per cent used a Talis reading list.
- The majority of respondents (80 per cent) use a link to the resource as a way of sharing copyrighted works with their students.
- When providing chapters or pages from print books to students, half of the respondents (50 per cent) use under 10% of the book.
- Nearly two-thirds of respondents (66 per cent) said they would not be impacted if Okanagan College were to cancel the Access Copyright license and instead rely on Fair Dealing guidelines.
- Similarly, about two-thirds of respondents (67 per cent) said they would not be impacted if Okanagan College were to limit or eliminate the ability to request print course packs in favour of an online course pack model.
- The majority of respondents (88 per cent) had not used Okanagan College’s reading list software, Talis Aspire, with 68 per cent of respondents not even being aware/familiar with the software.
- If the College were to offer services to assist with copyright clearing course readings and materials, nearly half of all respondents (48 per cent) said they would use a self-check copyright compliance list in Moodle.
- Online asynchronous and online synchronous workshops were the two most common methods of copyright education chosen by respondents, with 47 per cent and 39 per cent of respondents choosing those respective options.
- Nearly one-third of respondents (31 per cent) were interested in joining an OER focus group.

Results

Q1. What is your department?	Count	Percent of Count
Business	24	16.2%
Adult Upgrading	13	8.8%
Geography and Earth and Environmental Science	7	4.7%
English	7	4.7%
Practical Nursing	6	4.1%
Biology	6	4.1%
Mathematics and Statistics	5	3.4%
Interdisciplinary Studies	5	3.4%
Communications	5	3.4%
Psychology	5	3.4%
Chemistry	4	2.7%
Physics and Astronomy	4	2.7%
Trades	4	2.7%
Computer Science	3	2.0%
Anthropology	3	2.0%
Science, Technology and Health	3	2.0%
History	3	2.0%
Health Care Assistant	3	2.0%
Sociology	2	1.4%
Economics	2	1.4%
Electronic Engineering Technology	2	1.4%
Carpentry	2	1.4%
Adult Special Education	2	1.4%
Office Administration	2	1.4%
Therapist Assistant	2	1.4%
Arts and Foundational	2	1.4%
Continuing Studies	2	1.4%
Kinesiology	2	1.4%
Other	18	12.2%
Total	148	100.0%

2021 Copyright and Open Educational Resources Survey

Q2. Which best describes your employment at OC?	Count	Percent of Count
Continuing/Regular	128	86%
Term/Non-regular	16	11%
Other	4	3%
Total	148	100%

If a respondent selected “Other” in Question 2, they were asked to explain their selection. For the full list of “Other” responses please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Q3. Over the last two years, have you done any of the following in your courses?	Selection Count	Percent of Selection Count (/247)	Percent of Responses (/148)
Action 3: Used a combination of online learning materials, including library materials and/or materials available on the internet with no required commercial textbook	72	29%	49%
Action 1: Used an open textbook or other open educational resources as an assigned text	71	29%	48%
Action 2: Used an open textbook or other open educational resources to supplement a commercial textbook	51	21%	34%
Action 4: Used a print course pack/lab manual or any other low-cost option under \$30, with no required commercial textbook	41	17%	28%
Action 6: Have chosen not to require course materials	7	3%	5%
Action 5: Asked students to pay for an industry membership to access materials for the course(s), keeping the course materials cost under \$30 per course	5	2%	3%
Total	247	100%	167%

For each Action selected in Question 3, respondents were asked to enter the course name and numbers where the Action was implemented. For the full list of courses associated with each Action please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

2021 Copyright and Open Educational Resources Survey

Q4. What barriers have you found to adopting Open Education Resources (OERs) for your course(s)?	Selection Count	Percent of Selection Count (/221)	Percent of Responses (/148)
OERs are unavailable for my course	50	23%	34%
OERs do not include support/ancillary resources such as PowerPoints or test banks	41	19%	28%
I do not have time to adapt my course to using OERs	40	18%	27%
I am unsure where to find OERs	39	18%	26%
Other	36	16%	24%
The OERs I have looked at are not peer-reviewed	15	7%	10%
Total	221	100%	149%

If a respondent selected "Other" in Question 4, they were asked to explain their selection. For the full list of "Other" responses please refer to the "Copyright and OER Survey Verbatim Results – Open Ended Questions" excel file provided with this report.

Q5. On a scale of 1 to 5 with 1 being "not at all" and 5 being "extremely likely", how likely are you to use Open Educational Resources (OERs), zero-cost, or low-cost course materials in the future?	Count	Percent of Count
5	72	49%
4	37	25%
3	21	14%
2	11	8%
1	5	3%
Total	146	100%

Q6. What is your perception of OER?	Count	Percent of Count
Positive	91	62%
Neutral	47	32%
Negative	3	2%
Not sure	6	4%
Total	147	100%

Question 6 provided a text box for respondents to enter their comments regarding their perception of OER. For the full list of those comments please refer to the "Copyright and OER Survey Verbatim Results – Open Ended Questions" excel file provided with this report.

2021 Copyright and Open Educational Resources Survey

Q7. Not including course textbooks, which students purchase themselves, what types of copyrighted works do you use in your courses?	Selection Count	Percent of Selection Count (/629)	Percent of Responses (/148)
Videos – YouTube, Vimeo, or other free internet sites	127	20%	86%
Articles – found online (I.e., freely available newspapers, magazines, or Open Access journals)	105	17%	71%
Webpages, or reports from websites (I.e., PDF linked from a website)	101	16%	68%
Articles – from Library databases	78	12%	53%
Videos – streaming from Library databases	48	8%	32%
Book chapters – scanned from print	46	7%	31%
Book chapters – from Library e-books	34	5%	23%
Videos – from DVDs	34	5%	23%
Business Cases – freely available online	17	3%	11%
Videos – from subscription services like Netflix, Crave, etc.	15	2%	10%
Business Cases – purchased from Ivey, Harvard, or other paid sources	12	2%	8%
Other	12	2%	8%
Total	629	100%	425%

If a respondent selected “Other” in Question 7, they were asked to explain their selection. For the full list of “Other” responses please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Q8. Where would you normally share course materials with your students?	Selection Count	Percent of Selection Count (/212)	Percent of Responses (/148)
Moodle	142	67%	96%
Print course pack sold at the Bookstore	25	12%	17%
Other	17	8%	11%
Email	16	8%	11%
Talis reading list	12	6%	8%
Total	212	100%	143%

If a respondent selected “Other” in Question 8, they were asked to explain their selection. For the full list of “Other” responses please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

2021 Copyright and Open Educational Resources Survey

Q9. How do you share copyrighted works with your students?	Selection Count	Percent of Selection Count (/229)	Percent of Responses (/148)
Link to the resource	119	52%	80%
PDF of the resource	76	33%	51%
not part of a course pack	20	9%	14%
Other	14	6%	9%
Total	229	100%	155%

If a respondent selected “Other” in Question 9, they were asked to explain their selection. For the full list of “Other” responses please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Q10. If you have provided chapters or pages from print books to students, what percentage of the book do you commonly use?	Count	Percent of Count
Under 10% of the book	66	50%
I do not use books for course content	37	28%
I do not know	13	10%
Under 20% of the book	12	9%
More than 20% of the book	3	2%
Total	131	100%

Q11. The College has a license with Access Copyright (AC) which allows OC employees and students pre-cleared copying of up to 20% of individual titles in AC’s repertoire. Our AC license is used for copying from print books, as e-books and e-journals available through the Library have their own license agreements. The Fair Dealing guidelines allow copying of up to 10% of a book under most circumstances. If the College were to cancel our AC license and instead rely on Fair Dealing guidelines, how would that impact your teaching or student learning?	Count	Percent of Count
No impact	97	66%
Negative impact	35	24%
Positive impact	14	10%
Total	146	100%

If a respondent selected “Negative impact” as their response to Question 11, they were asked to explain their selection in a separate text box. For the full list of those comments please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

2021 Copyright and Open Educational Resources Survey

Q12. If the College were to terminate our Access Copyright license, the ability to create print course packs may be affected. If the College were to limit or eliminate the ability to request print course packs in favour of an online course pack model, how would that impact your teaching or student learning?	Count	Percent of Count
No impact	97	67%
Negative impact	44	30%
Positive impact	4	3%
Total	145	100%

If a respondent selected “Negative impact” as their response to Question 12, they were asked to explain their selection in a separate text box. For the full list of those comments please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Question 13 was an open-ended question regarding Okanagan College’s Access Copyright license. To view the full list of responses for Question 13 please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Q14. Talis Aspire is a tool that allows you to create online course reading and resource lists in Moodle. Have you used the College’s reading list software, Talis Aspire?	Count	Percent of Count
No, I am not aware/familiar with Talis	100	68%
No, but I am aware/familiar with Talis	30	20%
Yes	15	10%
Not sure	2	1%
Total	147	100%

Q15. Under which circumstances would you use Talis Aspire for a reading list or course pack?	Selection Count	Percent of Selection Count (/163)	Percent of Responses (/148)
I would not use a Talis list	56	34%	38%
I create the Talis list, add my own course readings, and manage changes to the readings myself each term	40	25%	27%
I submit my reading list/syllabi to the Library, a librarian creates the list for me, and I manage changes to the reading list each term	39	24%	26%
I submit my reading list/syllabi to the Library, and a librarian creates and manages the reading list for me each term	28	17%	19%
Total	163	100%	110%

2021 Copyright and Open Educational Resources Survey

If a respondent selected “I would not use a Talis list” as their response to Question 15, they were asked to explain their selection in a separate text box. For the full list of those comments please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Q16. Copyright compliance at the College is self-monitored by copyright users. The exceptions are resources that go through the Bookstore or Library, such as print course packs and Talis reading lists. If the College were to offer any of the following services to assist with copyright clearing course readings and materials, would you use them? Select all options that you would potentially use:	Selection Count	Percent of Selection Count (/193)	Percent of Responses (/148)
Self-check copyright compliance list in Moodle, made available when you link to or import a document	71	37%	48%
Submit course readings from your course schedule or syllabus to the Library for copyright clearance, and the Library creates course reading lists in Talis with copyright cleared readings	60	31%	41%
Submit course readings from your course schedule or syllabus to the Library for copyright clearance	58	30%	39%
Other	4	2%	3%
Total	193	100%	130%

If a respondent selected “Other” in Question 16, they were asked to explain their selection. For the full list of “Other” responses please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Q17. Which of the following methods of copyright education would you be most likely to use?	Selection Count	Percent of Selection Count (/314)	Percent of Responses (/148)
Online asynchronous workshop	69	22%	47%
Online synchronous workshop	57	18%	39%
Online reading list or handbook	41	13%	28%
In-person synchronous workshop	41	13%	28%
Lunch and learn and/or speaker series	36	11%	24%
I would not use any copyright education methods	18	6%	12%
Email list	17	5%	11%
Copyright Office pop-ins/office hours	14	4%	9%
Microsoft Teams channel	11	4%	7%
Copyright pop-ups around campus	5	2%	3%
Other	5	2%	3%
Total	314	100%	212%

2021 Copyright and Open Educational Resources Survey

If a respondent selected “Other” in Question 17, they were asked to explain their selection. For the full list of “Other” responses please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Question 18 was an open-ended question regarding any extra comments about copyright. To view the full list of responses for Question 13 please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Q19. Please select the focus group(s) you interested in joining to discuss these topics further:	Selection Count	Percent of Selection Count (/65)	Percent of Responses (/148)
Open Educational Resources focus group	46	71%	31%
Copyright focus group	19	29%	13%
Total	65	100%	44%

For each focus group a respondent selected they were asked to provide their name and email address so that they could be reached once the survey closed. For the full list of focus group contacts please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.

Question 20 asked respondents to provide their contact information if they were interested in learning more about open/low-cost options. To view the full list of contacts for Question 20 please refer to the “Copyright and OER Survey Verbatim Results – Open Ended Questions” excel file provided with this report.