

# Improving the Listing and Fulfillment of OER in U.S. Campus Stores

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## About DOERS3

This document is produced by the Driving OER Sustainability for Student Success Collaborative (DOERS3). DOERS3 is a collaborative open to public higher education systems and statewide/provincewide organizations that are supporting large-scale, Open Educational Resources (OER) initiatives and committed to advancing innovation in OER. As of this report date, we have 25 participating members in the U.S. and Canada representing 688 campuses and over 6 million students. As a collective, we believe in supporting student success through the implementation of affordable, openly licensed alternatives to high-priced, traditionally copyrighted, instructional materials. We recognize that the choice of instructional materials remains the purview of the faculty, and that OER are an increasingly viable option for faculty seeking to prepare and curate relevant and engaging course materials. Learn more at <https://www.doers3.org/>.

## Foreword

As defined by the William and Flora Hewlett Foundation, Open Educational Resources (OER) “are freely available, high-quality learning materials that can be downloaded, edited, and shared to better serve all students.” Educational materials that are freely available and openly licensed support student success through greater equity of access to materials, greater equity of representation of diverse voices within the materials; and greater equity of opportunity affording students to contribute to the development of these resources. According to the U.S. PIRG report, *Fixing the Broken Textbook Market*, cost barriers for required instructional materials have a significant negative impact on student success. The campus store serves a critical role in listing all course material options to students and their associated pricing as well as fulfilling the materials in various formats, including these no-cost or low-cost OER options.

## Why OER Listing and Fulfillment Matters

For many of our students, the campus store is the primary vehicle for determining and acquiring required and recommended learning materials. The process of listing and fulfilling those learning materials is a multi-stepped process that requires various interactions from faculty to content providers.

As more and more states adopt legislation that requires more transparency for students about which courses utilize OER as well as low-cost and no-cost materials, [DOERS3](#), a collaboration of public higher education systems, would like to see OER better integrated into those established listing and fulfillment processes. We view campus stores (i.e., bookstores) as critical partners to accomplish this task.

Campus stores support OER efforts on many campuses: participating in OER committees, raising awareness, and assisting with selection, fulfillment, and verification processes. Because of the central role that campus stores play in supporting the listing and fulfillment of learning materials, OER must be seamlessly integrated into the current processes. As the use of OER continues to grow, we would like to see the relationship between institutions and campus stores grow in support of OER listing and fulfillment. Students, faculty, and campus stores all stand to benefit from improvements.

This document proposes concrete actions and a set of effective practices focused on enhancing the relationship between the institution and the campus store, as well as the campus store's support of OER. It reflects results of a survey of institutional OER representatives (see Appendix) the DOERS3 Capacity Building Workgroup conducted in January-February 2020 and subsequent conversations with key stakeholders. The focus is on the U.S. campus store model.<sup>1</sup>

Given that OER is often in a digital format, it may not be immediately clear why campus stores play a role in OER. The campus store plays two critical roles:

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<sup>1</sup> Canadian campus stores do not share many of the same drivers as the U.S. market. For example, there is no legislation within Canada requiring the reporting of adopted learning materials to the campus store. In addition, there is not the same dependency between student financial aid and the campus store for materials purchase.

- 1) a means for compliance with reporting and disclosures required by the federal Higher Education Opportunity Act (HEOA) as well as states, systems, and institutions, often put into place to ensure transparency around pricing and available options for course materials.
- 2) a resource, sourcing, and fulfillment service for students and faculty (including printed OER).

## **Compliance with Federal, State, System, and Institutional Requirements**

Students, faculty, and administrators depend upon campus stores for information about materials that are required or recommended for each course. For this reason, the Higher Education Opportunity Act (HEOA) requires that institutions report to their campus store every “college textbook or supplemental material required or recommended” for each course.<sup>2</sup> All OER used as textbooks or supplemental materials defined by HEOA need to be reported, regardless of cost. Many states, systems, and institutions have similar compliance requirements for transparency.

## **Resource and Fulfillment Service**

Many campus stores play a role in printing OER. Though most OER are accessed digitally, having low-cost print options available is important for several reasons. Forty-nine percent (49%) of faculty still prefer print materials over digital, though this number is declining each year.<sup>3</sup> In a recent survey of multiple Achieving the Dream (ATD) grant institutions, 13% percent of students in zero textbook cost degree programs purchased printed copies of OER.<sup>4</sup> Some learning environments (such as physical sciences labs) are places where students and faculty may not want to expose expensive digital devices to the risks of a lab environment. And finally, some students may learn better with paper, and some who are impacted by the digital divide may not have ready access to online materials. The continued printing of OER is of value to all stakeholders.

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<sup>2</sup> Higher Education Opportunity Act 2008 (Public Law 110-315), page 122.

<sup>3</sup> NACS Releases Annual “Faculty Watch” Survey on College Course Materials (2020)

<https://www.techlearninguniversity.com/news/nacs-releases-annual-faculty-watch-survey-on-college-course-materials>

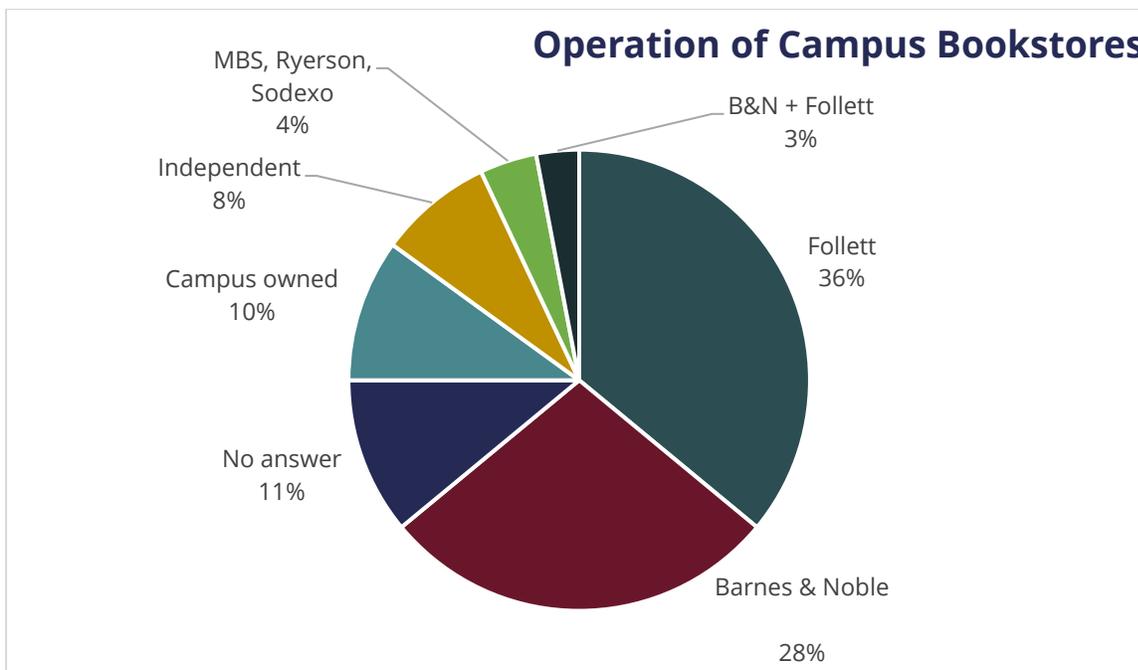
<sup>4</sup> Griffiths, R., Mislevy, J., Wang, S., Ball, A., Shear, L., Desrochers, D. [OER at Scale: The Academic and Economic Outcomes of Achieving the Dream’s OER Degree Initiative.](#)

## Survey Results

DOERS3 members originally identified the topic of OER listing and fulfillment as an area in which we could support institutions' efforts to offer OER as an option to their faculty and students. To broaden our knowledge, we conducted a survey of higher education professionals to understand their experience with OER in campus store. Requests for participants were posted to the Community College Consortium for OER (CCCOER), the Open Education Network (OEN), and Scholarly Publishing and Academic Resources Coalition (SPARC) listservs and publicized on Twitter. Between January 21, 2020 and Feb 10, 2020, we received 72 responses representing 64 different systems/institutions across 26 different states and provinces.

### Operation of Campus Stores

About two-thirds of survey respondents reported their bookstore was operated by Follett or Barnes and Noble. Ten percent reported campus-owned stores.



## Challenges for Listing and Fulfillment of OER

Six common challenges were reported by about a third of the respondents.

### Most Reported Challenges

1. The campus store does not list a digital ISBN (International Standard Book Number) for open textbooks or other OER, preventing fulfillment of a free, digital version (32%)
2. The campus store lists only the print version of an open textbook or other OER as required when the free, digital version is an acceptable format (32%)
3. The campus store uses vague, unclear, or inconsistent language about course material requirements (e.g., optional resources suggested for purchase by the store are not presented in context) (32%)
4. The campus store does not allow for custom messaging about OER (32%)
5. Print copies of OER sold in the bookstore are presented on shelves without information about the availability of free, digital access to the content (29%)
6. The campus store's discovery and/or course material reporting system does not accurately classify OER (e.g., proprietary resources are tagged as OER; open textbooks are not tagged as OER) (29%) \*

As an extension of the reporting concerns, some respondents provided additional comments regarding data sharing concerns. They reported that their campus stores may not fulfill requests for data about course material adoptions with other stakeholders at the institution. Others noted that when fulfilled, this information is shared in formats that make meaningful analysis of the data especially difficult.

There were also other challenges noted by the respondents:

1. Campus store notes about OER are presented separately from other pricing and access information, in smaller font, or are otherwise obscured (13%)
2. The campus store or associated vendor charges a fulfillment fee for the free, digital version of an open textbook or other OER (11%)
3. The campus store prohibits OER usage (3%)

## Effective Practices

According to our respondents, some campus stores have implemented effective practices for OER listing and fulfillment such as:

- OER are reflected in campus store catalogs and displays, regardless of whether there is any cost associated with them.
- OER are correctly and clearly marked as OER.
- Materials are correctly and clearly marked as required, recommended, or optional.
- OER pricing is appropriately indicated.
- Adoption information for both commercial and open materials is provided to the institution in regular intervals.

DOERS3 would like to see all campus stores adopt these best practices, as they would benefit students whose courses use OER.

## Campus Store Fulfillment Process

To understand the potential challenges in implementing the effective practices highlighted above, we have examined the process by which a resource is provided to the campus store and made available to students (physically or online). Below is that chain of events, with the role of each step explained.

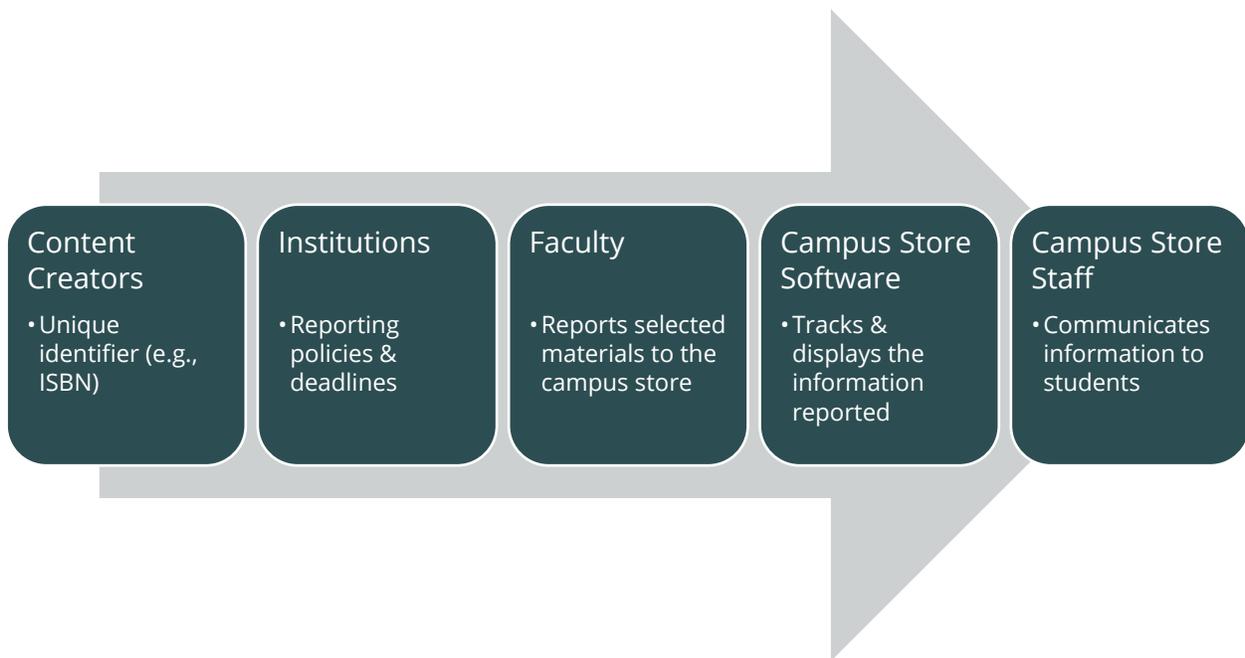


Figure 1: Campus Store Fulfillment Process

## Recommended Practices

From a root cause analysis of the responses and further conversation with key stakeholders, a list of effective practices for the listing and fulfillment of OER within the campus store was developed and is presented below. We encourage localizing this list to your institution's or system's circumstances and focusing first on those which you believe will have the highest impact. There is clearly improvement needed on behalf of both stakeholders within the institutions and the campus store itself, and only through greater partnership can we improve the listing and fulfillment of OER for the benefit of our students.

### Effective practices for OER listing and fulfillment

From an analysis of the commonly cited challenges, we have developed a list of effective practices for OER listing and fulfillment below.

## Creators

- Authors: When appropriate, assign one ISBN\* for digital and another for print
- Authors: When ISBNs are not appropriate, assign an alternate unique identifier
- Creation platforms: Encourage/supply digital and print ISBNs

## Institutions

- Clarify policies and protocols to make clear that OER needs to be reported to the bookstores
- Make clear when reporting is due for all adopted materials
- Clarify policies and protocols on price transparency designations
- Communicate with bookstore managers about OER benefits as well as any local OER/affordability efforts
- Define communication channels - who is authorized to contact bookstore and request information/service

## Faculty

- Report instructional materials in an appropriate timeframe to the bookstore
- Provide digital ISBN, alternative ID, and/or URL for OER materials
- Clearly designate which resources are required vs. optional
- Clearly designate digital vs. print format as required/optional
- Designate price transparency designator if applicable

## OER Coordinators

- Encourage timely adoption submissions, sharing information with campus stores on faculty using OER to help fill in the blanks of no submissions
- Help stores identify any errors in faculty adoption submissions for OER
- Involve the campus store on OER committees and taskforces
- Conduct joint presentations with campus stores on OER and affordable course material options

## Campus Store Software

- Provide a mechanism for easy entry of OER materials, including digital ISBN and/or URL
- Automatically verify materials selected for license and price
- Provide easy access to data/reports on adoptions, possible API connectors
- Provide the ability to add price transparency designators for reporting
- Automatically generate reports on adoptions/designations
- Use symbol/color coding for formats and pricing options to clarify choices for students
- Allow the institution to control on-screen messaging to students and/or provide more messaging options to better reflect content adoption

## Campus Store Policy & Protocols

- Provide step-by-step guides for faculty adoptions within software
- Provide in-store direction for free/digital materials
- Communicate with faculty regarding options that may be available for making hard copies of digital OER available for students
- Provide institutions education about contract terms, especially related to outside fulfillment terms

*Figure 2: Effective Practices for OER Listing and Fulfillment*

*\*Note: there is a cost associated with ISBN acquisition and this may not always be a feasible option.*

## **Partner Engagement**

Prior to the release of this report, DOERS3 engaged in conversations with some of the major campus store partners: National Association of College Stores (NACS), Follett, and Barnes & Noble College. In sharing a draft of this document, those campus store partners gave positive reception to the suggested best practices. Further, Barnes & Noble College provided a written statement of support that indicated several ways that they are committed to providing affordable course material solutions for institutions, including 1) providing an Affordability Options section of the homepage that discusses the benefits of OER; 2) Tagging OER in their catalogs to make it easy for faculty to discover OER content in their adoption platform; 3) showing course materials, including OER, required for every class and section prior to registration; and 4) sitting on institutional OER and affordability committees whenever possible.

DOERS3 would like to see a continued partnership between institutions, campus stores, and campus store operators in the implementation of the suggested best practices to improve the overall listing and fulfillment of OER for the benefit of our students.

## **Contributors**

The “Improving the Listing and Fulfillment of OER in U.S. Campus Stores” report was authored by members of the DOERS3 Capacity Building Work Group including Kevin Corcoran (Connecticut State Colleges & Universities); Michelle Reed (formerly of the University of Texas at Arlington); Deepak Shenoy (Deep Consulting); and Annika Many (edBridge Partners).

## Appendix: Survey Questions

### Your OER Experience with the Bookstore

Driving OER Sustainability for Student Success (DOERS3) Collaborative:

DOERS3 is a collaborative open to public higher education systems and state-wide/province-wide organizations that are supporting large-scale, state-wide/province-wide Open Educational Resources (OER) initiatives and committed to advancing innovation in OER.

As part of our efforts, we are exploring ways to strengthen the partnership between the bookstore and our local OER initiatives. We would appreciate you, the OER advocates on your campus, taking 15-20 minutes to complete the survey below. The survey will close on February 10, 2020.

The information you provide will help the DOERS3 Collaborative seek out innovative practices and standards.

Questions or concerns about this survey or the DOERS3 Collaborative may be submitted to Deep Shenoy at [deep@deep-consulting.net](mailto:deep@deep-consulting.net).

For more information, please visit the DOERS3 Statement of Purpose:

<http://bit.ly/d3sop9Oct19>.

### Privacy Statement

The information collected through this survey will be used in an aggregated and anonymized form. If any aspect of the information you provide is published, your name and institution will NOT be associated with the findings.

### Copyright Statement

The questions used in this survey are created by DOERS3 and licensed under CC BY 4.0, <https://creativecommons.org/licenses/by/4.0/>

### About You

- Full Name (Optional)
- Work Email (Optional)
- Role/Position
- Institution

## Your Experience with Bookstore

1. What is your current process for faculty to report OER usage in compliance with price transparency?
  - a. Faculty or administrative assistants submit OER usage directly to campus bookstore via personal communication, LMS plugin (e.g., Follett Discover), or other store-owned mechanism
  - b. Faculty or administrative assistants submit OER usage information to an OER coordinator, who communicates with bookstore and/or registrar on behalf of OER users
  - c. Faculty or administrative assistants submit OER usage information directly to university registrar
  - d. Faculty are not required to report OER usage
  - e. Other
2. Is information about OER usage shared with students in course catalogs or via other public-facing lists or systems? Select all that apply.
  - a. Yes, OER usage is integrated as a course designation/note/attribute/other in the school's student information system.
  - b. Yes, OER usage is shared via the campus bookstore's website.
  - c. Yes, OER usage is shared publicly as a separate list of courses.
  - d. No, OER usage is not publicly shared with students.
  - e. Other
3. Is your institution impacted by state, local, or other policy that specifically requires disclosure of OER usage? Select all that apply.
  - a. Yes, state law requires disclosure of OER usage
  - b. Yes, system policy requires disclosure of OER usage
  - c. Yes, institutional policy requires disclosure of OER usage
  - d. Yes, grant funding requirements dictate disclosure of OER usage (e.g., Achieving the Dream)
  - e. No, the institution is not specifically required to disclose information about OER usage
  - f. Other
4. Please provide any additional information necessary to help us understand the reporting process (e.g., How/from whom are reporting requirements communicated? What challenges exist with this process? Were new mechanisms created for reporting OER? Is OER usage vetted by anyone if publicly shared, and if so by whom?)
5. In which ways do you collaborate with your campus bookstore?

- a. The bookstore contributes to a working group, task force, or committee related to OER
  - b. The bookstore collaborates with other campus units to ensure compliance with OER reporting requirements
  - c. The bookstore collaborates with faculty and OER advocates to provide optional print copies of OER to students
  - d. The bookstore contributes to the development of marketing materials, professional development opportunities, or other outreach to advance OER
  - e. The bookstore does not currently contribute to OER efforts on campus
  - f. Other
6. What challenges have you experienced with your bookstore's practices as they relate to OER. Select all that apply.
- a. The bookstore does not list a digital ISBN for open textbooks or other OER
  - b. The bookstore or associated vendor charges a fulfillment fee for the free, digital version of an open textbook or other OER
  - c. The bookstore lists the print version of an open textbook or other OER as required when the free, digital version is an acceptable format
  - d. The bookstore uses vague, unclear, or inconsistent language about course material requirements (e.g., optional resources suggested for purchase by the store are not presented in context)
  - e. The bookstore does not allow for custom messaging about OER
  - f. Bookstore notes about OER are presented separately from other pricing and access information, in smaller font, or are otherwise obscured
  - g. Hard copies of OER sold in the bookstore are presented on shelves without information about the availability of free, digital access to the content
  - h. The bookstore's discovery and/or course material reporting system does not accurately classify OER (e.g., proprietary resources are tagged as OER; open textbooks are not tagged as OER)
  - i. The bookstore prohibits OER usage
  - j. Other
7. Have you tried to address any of these issues noted above with bookstores?
- a. Yes
  - b. No
8. If you have tried to address these issues, how did the store respond? Were the problems resolved?
9. What do you see as an optimal process for faculty to designate the usage of OER within the bookstore? Please explain.

10. What elements of the student display within the bookstore interface would you like to see improved to avoid material acquisition confusion?
11. Are you aware of any contractual language that prevents the bookstore from listing or fulfilling OER assigned materials?
  - a. Yes
  - b. No
12. If you are aware of any contractual language that prevents the bookstore from listing or fulfilling OER, please explain or provide sample language.
13. Please provide your bookstore partner(s).
  - a. Akademos
  - b. Barnes & Noble
  - c. Follett
  - d. Other
14. Is there anything else you would like us to know?