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# Case Study: Portland State University Library's Open Textbook Publishing Program, PDXOpen

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# Case Study

## Portland State University Library's Open Textbook Publishing Program, PDXOpen

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## Background

In 2013, with the support of a Provost-backed initiative focused on innovative ideas to improve student success, Portland State University (PSU) Library developed an open textbook publishing grant program. The grant program, [PDXOpen](#), emerged with the goal to save students money, facilitate research, and remove barriers to information by way of open textbook publishing.

In May 2013, the Library released a campus-wide call for proposals (CFP) that sought open textbooks that were geared towards a specific field of study and were original works. Successful authors received a small stipend of \$2,500, which could be allocated at the faculty member's own discretion. Uses of the stipend have included professional travel, research support, and compensation for peer-reviewers, accuracy checkers, designers, and copy editors. The first round of grant funding was awarded in June 2013 to five PSU faculty/instructors. The open textbooks created, during this first round, spanned a variety of academic disciplines including Japanese, Special Education, Graphic Information System (GIS), Gender and Sexuality Studies, and Calculus. These first five open textbooks published in December 2014, 18 months after the grant was awarded, saved PSU Students an estimated total of \$23,805 in their first term of being used.

Working closely with the Provost, Alumni Association, and the PSU Foundation, which works with donors to raise money for the University, the Library released a yearly campus-wide CFP. From Fall 2015 - Fall 2018, the Library supported the creation of 16 open textbooks. Those open textbooks:

- Have a heavy focus in World Languages.
- Are designed for 300 & 400 level courses that have smaller class sizes.
- Have been downloaded more than 182,000 times across 216 countries.
- Saved 3,554 PSU students over \$330,000.

In 2019, the Library expanded the PDXOpen grants program to support adoption and adaptation of open educational resources (OER) by PSU faculty/instructors who teach high-enrollment courses. The program was expanded in an effort to encourage instructor experimentation and innovation in finding new, better, and less costly ways to deliver learning materials to their students through OER. Through the expanded grant program, we provided \$3,000, \$5,000 and \$8,000 stipends to faculty to develop OER for courses that they teach. We increased the stipends to enhance the professionalization of newly created resources, to ensure the open textbooks' high quality (with copyediting, design, peer review, etc.), and to more fully compensate for the significant labor invested in the adoption, adaptation, and creation of open teaching and learning content. The eight faculty projects will be published by summer of 2021 and are projected to save 3,110 PSU students and estimated \$777,725 in one academic year.

## Lessons Learned

**Accessibility.** Over the years, we have learned a great deal about digital accessibility and realize that many of our open textbooks were not necessarily designed with accessibility in mind. While we can now provide faculty authors with guidelines for inclusive, equitable, and accessible design principles, we are working to improve the digital accessibility of PDXOpen textbooks that have already been published. In January 2020, the PSU Library was able to hire an Open Textbook/OER Publishing Assistant on a temporary 6-month contract with a focus on improving the accessibility of our open textbooks. We have now developed workflows for remediating inaccessible open textbooks, as well as a set of general accessibility standards in the form of an [Accessibility Statement Template](#) which we now include in the front matter of all of our open textbooks.

**Provide workshops.** Although faculty create high-quality open textbooks and may publish in a variety of capacities, they may not be familiar with best practices and standards of open publishing. When we started PDXOpen, the project team assumed that faculty authors understood the complicated worlds of copyright permissions, fair-use, and self-publishing. We discovered that, while authors are well-versed in their areas of academic expertise, they may not be well-versed in navigating copyright and understanding what it takes to publish an open textbook. Therefore, with each new round of funding we now provide two workshops:

- Self-Publishing
- Copyright and Creative Commons

For our workshop on self-publishing we partnered with Ooligan Press, a general trade publisher affiliated with PSU. The workshop covers information on hiring copy editors, designers and proofreaders.

Both workshops are offered at the start of the proposal cycle, and not only provide the opportunity for authors to meet one another, but to also start thinking about publishing needs and budget.

**Define support and manage author expectations.** During our first round of funding, we quickly learned that it was important to set author expectations and clearly define their role. We asked ourselves the following questions:

- What publishing services can the Library offer?
- Will authors be responsible for finding editors and designers?
- Who is responsible for clearing copyright permissions?
- What types of peer review (single blind, double blind, or open review) will be allowed?
- How many of the reviewers can be affiliated with our institution?
- How does the publishing team track the author's progress?

**Budget.** With each new proposal cycle we learn something new. Here are just a few things to consider when getting started:

- Always develop a timeline and budget collaboratively with an author.

- It is important to establish regular check-ins with authors to update timelines for future spending.
- If possible, have a fiscal analyst or accountant on your team in order to make sure the budget is being spent correctly. Schedule regular meetings to ensure that your budget team is meeting budgetary expectations and deadlines.
- Decide early on (before advertising the grant opportunity, if possible) what types of expenses can be paid with the grant funds. Will you allow travel expenses, student employees, etc.?
- Decide early on whether funds can be used to pay employees only off-contract (summer support) or also on-contract (overloads/supplemental pay).
- Note any differences between paying honoraria (such as for peer reviews) to non-employees vs. employees. For example, you may need to budget for other personnel costs like benefits, employer payroll taxes, etc. when paying honoraria and creating contracts for employees.
- Provide “calculators” to help authors with various budget scenarios (such as paying themselves, regular employees or student employees).
- Give authors guidelines for how much advance notice is needed for creating contracts, hiring employees, etc.

**Importance of Peer Review.** Peer reviewers strengthen the validity, effectiveness, and appropriateness of the text. While PDXOpen is aimed at PSU classes first and foremost, we also want the books to be adopted at other institutions. We have learned the importance of peer review to other institutions adopting our open textbooks, and we now involve people who are not affiliated with PSU in a review process before the manuscript is published.

## Resources

- [PDXOpen website](#)
- [Open Education Initiative @ PSU](#)
- [Improving the Digital Accessibility of OER: A Reflective Guide](#)
- [PSU OER LibGuide](#)
- [Open Textbook Network Publishing Curriculum](#)