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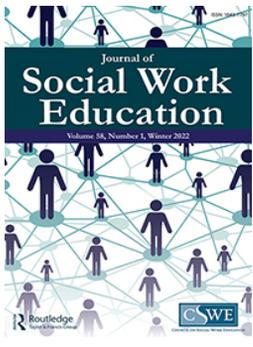
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DeCarlo, Matthew P., "Teaching Note—Adopting, Adapting, and Creating Open Textbooks: A Brief Guide for Faculty" (2021). *Social Work Faculty Work*. 2.

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To cite this article: Matthew P. DeCarlo (2021): Teaching Note—Adopting, Adapting, and Creating Open Textbooks: A Brief Guide for Faculty, Journal of Social Work Education, DOI: [10.1080/10437797.2021.1992322](https://doi.org/10.1080/10437797.2021.1992322)

To link to this article: <https://doi.org/10.1080/10437797.2021.1992322>



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Published online: 10 Nov 2021.



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Matthew P. DeCarlo

ABSTRACT

Across North America, the open education movement has blossomed in the past 10 years, with a majority of institutions of higher education employing open textbooks in at least one course. Unfortunately, social work lags behind other disciplines in the adoption, adaptation, and creation of open educational resources. This teaching note offers practical advice for faculty exploring open education based on the lessons learned from the author's two open textbook projects for undergraduate and graduate social work research methods. As universities, states, and international bodies increase funding for open education projects, the field of social work should demonstrate its commitment to equity, inclusion, and justice by leading these efforts within our classrooms, discipline, and institutions.

ARTICLE HISTORY

Accepted: December 2020

Open educational resources (OER) refer to “teaching, learning or research materials that are in the public domain or released with intellectual property licenses that facilitate the free use, adaptation and distribution of resources” (United Nations Educational, Scientific, and Cultural Organization [UNESCO], 2019, p. 9). Open textbooks are part of a broader palette of OER, which includes common learning tools like assignment prompts, case studies, videos, and so forth. The resources shared as OER are part of a multifaceted open education movement, including the open university model pioneered in the United Kingdom, massively open online courses, education equity in the developing world facilitated by UNESCO, as well as collaborative, networked, and radical pedagogical approaches like open pedagogy, open educational practices, and critical digital pedagogy.

Open textbooks are a good introduction for faculty exploring open education. A commercial textbook and an open one are likely to include similar components and content, but open textbooks carry an open copyright license—most often, a Creative Commons license. Instead of reserving all rights to a commercial textbook publisher, open licenses permit faculty and students to access the textbook for free and use its content in transformative ways. These permissions help faculty transcend limitations imposed by traditional copyright, as described in [Table 1](#).

The case for OER

Open education projects harness technology for social good by ensuring access to scholarly knowledge regardless of ability to pay as well as encouraging faculty, students, and anyone to use scholarly knowledge in new and transformative ways (Berzin et al., 2015).

Cost

Students cannot learn from textbooks and other materials they cannot afford to purchase. The majority of OER studies find that students using open textbooks achieve equivalent outcomes at lower cost (Clinton & Khan, 2019; Hilton, 2020). Social work students at Virginia schools reported

Table 1. What is an instructor permitted to do with open and commercial textbooks?

Are Instructors Permitted to ...	Commercial Textbook	Open Textbook
Assign readings and teach from the textbook?	Yes	Yes
Summarize, quote, and critique the textbook in a lecture or in writing?	Yes	Yes
Record videos or create assignments using content from the textbook and post them on an LMS platform?	Yes	Yes
Edit, customize, and add new content to the textbook?	No	Yes
Mix content from different textbooks together?	No	Yes
Post a free digital copy of the textbook on an LMS platform?	No	Yes
Create and publicly share slideshows, videos, or other resources that reuse and repurpose content from the textbook?	No	Yes

Note. LMS = learning management system.

delaying the purchase of required textbooks, skipping meals, taking on additional loans and work, and engaging in copyright infringement to afford textbooks (DeCarlo & Vandergrift, 2019). By providing free access, open textbooks can improve academic performance, particularly among individuals from historically underserved groups in higher education: part-time, nonwhite, and Pell-eligible students (Colvard et al., 2018).

Localization and decolonization

Because open content can be easily edited and republished, it enables faculty to localize and decolonize learning materials. For example, textbooks on child welfare might use common core content applicable across North America with localized content created by individual faculty for regulations, trends, and client populations relevant to their institutional context (see Lynham, 2018 for an example). As the field of social work looks to decolonize its curriculum, it may also draw from efforts such as those from Maskwacis Cultural College, which adapted open textbooks to reflect Indigenous perspectives on sociology and earth science (Farrow, n.d.).

Open pedagogy

Open pedagogy is a term with contested meaning. Similar to Wiley and Hilton's (2018) concept of OER-enabled pedagogy, it can mean collaboratively adapting and creating public and openly licensed scholarship with students—for example, by adapting new resources from open content, collaboratively creating or annotating textbooks, or contributing to Wikipedia—in place of “disposable” assignments written or performed solely for the professor and trashed at the end of the semester (see Mays, n.d. for more examples). Other barriers to education addressed by open pedagogues include digital redlining, surveillance, and poverty, representing a critical, international, and human rights view of open pedagogy consonant with the grand challenge to harness technology for social good (DeRosa & Jhangiani, n.d.).

Community building

OER scales the informal resource-sharing between colleagues and on community electronic mailing lists as well as formal resource-sharing at academic conferences or in journal publications. Open education projects invite collaboration by providing free public access and explicit permission for transformative use through attaching an open copyright license. The connections, community, and criticism that come from sharing render community-driven resources more robust and relevant over time. Although OER are touted largely as a cost-saving and accessibility measure for students, it is truly the associated community-building aspects that will render open education a lasting and transformative pedagogical practice in higher education.

Open textbook projects: Adoption, adaptation, and creation

The purpose of this teaching note is to assist professors in implementing their own open textbook projects. Adoption projects are the smallest in scope, while adaptation and creation projects require more time and resources to complete. The following sections review lessons I learned from coordinating two open textbook projects in social work education.

Adoption

Open textbook adoption refers to replacing a commercial textbook with an openly licensed book. At present, 56% of all universities in the United States use an open textbook in at least one class, but most adoptions are in general education courses (Ruth, 2019; Seaman & Seaman, 2018). Faculty adopting open textbooks saved students over one billion dollars versus commercial alternatives in just 5 years (Allen, 2018).

Lesson 1: Few social work resources

Historically, open textbooks were designed for high-enrollment courses. As a result, there are very few textbooks specifically designed for social work courses in either the 700-book Open Textbook Library or 300-book BCCampus textbook collection. Faculty who adopt an open textbook may need to budget time to create slideshows, test banks, and other ancillary resources commonly provided by a commercial publisher, as not all open textbooks include them. At present, there are a handful of textbooks designed specifically for social work with another handful of relevant textbooks published by allied disciplines, as indexed by the Open Social Work website. The lack of open resources designed specifically for social work is in stark contrast to psychology, home to the nonprofit OER publisher Noba Project, which recently dedicated a special edition of the journal *Psychology of Learning and Teaching* to open education.

Lesson 2: Create a student access plan

OER represents a culture shift for students accustomed to buying commercial textbooks. In my pilot project, students looked at the university bookstore for information about required textbooks and then bought them online from Chegg, Amazon, and other cheaper resellers. I distributed links to the open textbook via the syllabus, e-mail, and in class announcements; however, nearly all students purchased the bookstore's \$50 print-on-demand edition of the textbook (DeCarlo et al., 2019). Based on student feedback, I now dedicate the first class meeting to reviewing how to download, read, and notate an open textbook in mobile and computer web browsers as well as where to find the textbook links in our learning management system.

Adaptation

The process of customizing an existing open textbook for new learning goals is called adaptation, and it can take many forms. Professors may find a textbook from another discipline that needs only a few edits to be relevant to social workers; alternately, book chapters, case studies, videos, and other OER can be curated, combined, and republished as an open textbook.

Lesson 3: Learn the basics of open licensing

Although Creative Commons licenses are designed to be easy to understand for the layperson, faculty adapting OER for their courses should consult a librarian for assistance. I adapted my textbook from *Principles of Sociological Inquiry*, by Blackstone (2012), licensed by the Saylor Foundation. It carries the most restrictive license for OER (CC-BY-NC-SA). This copyright license requires that, in adapting Dr. Blackstone's work, I attribute any of her content I use (BY, or attribution), forgo commercial profit (NC, or noncommercial), and apply the same license she used to my adapted book (SA, or share-alike). Authors adapting existing open content are constrained by the original author's license, and when

mixing works together, must check for license compatibility. In my textbook, I mixed in content from an open textbook (Frederiksen & Phelps, 2017) with a compatible license (CC-BY) as well as openly licensed photos from Pixabay, Unsplash, and Pexels.

Lesson 4: Personalize your book

I often felt my class lectures were largely translating the dense language in the commercial textbook for students. Addressing this problem was the most exciting part of adapting an open textbook. I chose Blackstone's book to adapt because it was written using conversational language intended to disarm and engage students, and I inserted stories from my lectures that reflected my interests, research experience, and personal life to help the book feel more human. I spent a summer revising Blackstone's textbook by first copying it from HTML to Word and doing a line-by-line edit, revising any sociology-focused material (e.g., field research) and adding social work-focused material (e.g., evidence-based practice).

Lesson 5: Pilot test and revise

After my first summer on the project, I pilot tested the textbook on a satellite campus with a small class of students who joined our program through a local community college. They were appreciative of the no-cost textbook option, and to access the book, most students simply printed out the Portable Document Format (PDF) copy of next week's chapter and created a binder that included textbook printouts, their notes, and classroom activities. At the end of the semester, students shared feedback on the textbook, including grammatical errors, unclear language, and formatting issues that informed future revisions.

Lesson 6: Measure learning outcomes

As a new pedagogical tool, open textbooks are likely to be met with some skepticism by faculty and administrators. Faculty using open textbooks should measure their effect on student learning, thereby augmenting the data from student evaluations of teaching. Common metrics of student outcomes include final grades, withdrawal and drop rates, and test scores. I supplemented these with two additional measures. First, I included a pretest and posttest using a previously published measure of research knowledge. I also worked with student researchers to conceptualize, facilitate, and analyze focus groups exploring student perceptions and use of the book (Hilton et al., 2016). The assessment of these data points, in addition to the \$8,000 saved by students, supported my continued engagement with OER at my institution.

Lesson 7: Share on an open platform

To benefit the community, OER should be shared publicly. I worked with graduate and undergraduate student editors as well as volunteer labor from a librarian, textbook designer, and copy-editor to prepare and share a first edition of the textbook. I published my textbook on Pressbooks, an open source platform that charges a one-time fee of \$99 for hosting and support. My decision was informed by many factors, including that other authors could easily remix and adapt my textbook, and that I could independently host my textbook on a personal WordPress website. Faculty may want to consider competitors like Overleaf and Libtexts or simply uploading a PDF or Word document to a university repository, OER repository (like Merlot or OER Commons), or Amazon Kindle Direct Publishing (Anthony & Venable, 2019). I also submitted my book to the Open Textbook Library, where it received open (identifiable and public) peer reviews from faculty at other universities. Reviews were largely positive but noted the white male perspective was centered, indicating an area for growth in a second edition. I have also collaborated with reviewers after reaching out to thank them. In addition to open education platforms, outreach to social work professors on the Baccalaureate Program Directors (BPD) electronic mailing list and at conference presentations provided the largest source of early adoptions.

Table 2. Overview of resources for open textbook projects

Pedagogical Need	Resources
Learning the basics of open textbooks and OER	OER Starter Kit (Elder, 2019) and workbook (Katz & Elder, 2020) 5R's of OER (Wiley, n.d.)
Finding open textbooks and other OER to adopt or adapt	Open Textbook Library BCCampus textbook collection OER Commons Merlot Mason OER Metafinder Prof2Prof Open Social Work
Finding openly licensed media to remix into an open textbook	TED talks Pixabay Unsplash Pexels
Managing open textbook projects	Rebus community <i>Rebus guide to publishing open textbooks (so far)</i> (Ashok & Hyde, n.d.) <i>BCCampus open education self-publishing guide</i> (Aesoph, 2018)
Open textbook publication platforms	Pressbooks Libretexts Manifold Overleaf Amazon Kindle Direct Publishing (formerly Createspace)

Lesson 8: Include an adoption survey

In the front matter of the textbook, I included a short survey for faculty who adopted the book. Based on the responses, the book has now been adopted at more than 50 campuses in the United States and several international schools, reaching at least 1,500 students in the first 2 years since publication. Financial effect can be challenging to measure, as students rarely pay full price for a textbook and routinely engage in cost-cutting strategies such as renting or buying used books. However, compared with the full price of the commercial textbooks previously used in each course, students have saved over \$200,000 since the book's release in August 2018. For 83% of faculty adopters, this was their first time adopting an open textbook, with a majority of adopters reporting limited knowledge of OER.

Lesson 9: Plan for sustainability

Sustainability in OER has many meanings. For this project, sustainability involves correcting mistakes, adding suggested content, and updating the changelog in the front matter of the textbook over academic breaks. It also means assisting faculty users with questions on how to adopt the book or requests for ancillary resources. Volunteering my enthusiasm and experience to adopters helps ensure the sustainability and reach of my project. For example, after a faculty member said they were considering adapting the textbook for new learning goals, I made the Pressbooks extensible markup language file for my textbook available for download. With this file, she could easily import my book into her own Pressbooks project, rather than manually copy and paste content. This new textbook and a quiz bank from another faculty member are the first two adapted resources from my open textbook project. Social work faculty considering adapting an open textbook should consult the resources in Table 2.

Creation

Open textbook creation is challenging because one must write an entire textbook and also replicate the functions and resources of a textbook publisher. Creation projects are therefore larger in scope, often involving multi-institutional and interdisciplinary partnerships.

Lesson 10: Secure funding

Although OER are free to students, they are not free to create. As junior and contingent faculty, authors were unable to take sabbaticals. However, we were grateful to receive a \$23,750 grant through the Virtual Library of Virginia. Grants supporting OER generally focus on high enrollment courses, but our team was able to achieve similar student effect by redesigning multiple 20- to 30-student classes across institutions. We estimated our project would reach 175 students, and given the cost of the commercial resources replaced (\$175–\$200), students would save about \$29,500 in the first year of implementation. OER grant programs are becoming more common on the university and state level, and multi-institutional partnerships will be key for social work faculty to win grants over faculty redesigning high-enrollment classes in other disciplines. Moreover, financial support helps legitimize the often-invisible labor that goes into open publication (Versluis et al., 2019).

Lesson 11: Dedicate a project manager

In transitioning from a sole-author to a team-based project, the biggest surprise was the increase in time spent on administrative tasks. As the project manager, I was responsible for coordinating paperwork, funding, contracts, and emergencies. I relied heavily on the *Rebus Community Guide to Publishing Open Textbooks (So Far)* (Ashok & Hyde, 2019), which helped me formalize job roles and responsibilities within a large team and guided me through each step of the process. However, time spent on project management made it difficult to complete my authoring and editing work on time.

Lesson 12: Build a team

Team members should include both subject matter experts and those with expertise relevant to academic publishing—designers, editors, and educational technologists. My coauthors were drawn from my professional network, three students in my PhD cohort who regularly teach Bachelor of Social Work and Master of Social Work research classes as assistant and adjunct professors. I trusted the quality of my coauthors' work and appreciated that they drew from a wide range of subject matter experience in government, nonprofit, and academic social work research. Authors should strongly consider collaborations that bring together academic and practitioner authors. Our team was fortunate that experts from across my state donated their wisdom in library publishing, instructional design, and educational technology to our project. If you do not know the resources in your state, consider using the Rebus Community platform to solicit contributors with specific skills, consult a librarian, or budget time to develop the necessary skills yourself.

Lesson 13: Solicit peer and student review

In addition to specialists and authors, our team recruited student and senior faculty advisors who provided formative feedback for a small stipend. Through each step of the process, student feedback grounded the project in what students truly needed to know to be successful in research classes. Students were also welcomed as content creators, and an appendix was added for student-to-student resources. Alongside student advisors, three senior faculty advisors provided formative feedback on early products as well as summative feedback on final drafts. After incorporating advisor feedback, we submitted an open call for reviewers on the BPD electronic mailing list. To our surprise, more than 20 faculty reviewers volunteered to provide additional review. External review imbued our resource with more faculty wisdom and made it relevant to other campuses, laying the groundwork for a community of faculty adopters, adapters, and

collaborators. Peer review is significant, as research indicates that concerns about quality affect the adoption of OER (Seaman & Seaman, 2018). The final text includes a peer review statement including institutional affiliations of all reviewers, the review process, and how reviewer comments were integrated by authors.

Lesson 14: Set realistic timelines

Writing is likely to take place over summer break—likely, multiple summer breaks. It took me about a month to completely write a chapter, with additional time needed for peer review, visual design, and beta testing. Unfortunately, I had planned for writing to take far less time, and the missed deadlines compounded as the project moved forward. While collaborators were very understanding and supportive, the shifting deadlines led to some reviewers dropping out of the project and authors overwhelmed by work.

Open foundations and open futures

At its heart, open education is about using technology to inscribe social justice into pedagogy and scholarly communication. Adopting an open textbook ensures free, permanent, and first-day access to the textbook needed to succeed in the class for all students, eliminating the second tuition bill that comes from the bookstore. Furthermore, faculty who adapt and create open textbooks sustain a foundation of noncommercial and open access knowledge as part of a community. There is nothing new about professors sharing resources, but openness scales public sharing of educational resources to fashion a more equitable social work knowledge ecosystem.

Disclosure statement

No potential conflict of interest was reported by the author.

Funding

This work was supported by the Virtual Library of Virginia (VIVA) Course Redesign Grant, Radford University's Waldron College Research Award, and the Open Education Group's OER Research Fellowship.

Notes on contributor

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