LE MOYNE

Spirit. Inquiry. Leadership. $\mathcal{J}esuit$.



Open Educational Resources Tom Keays, Falcone Library

Introduction...



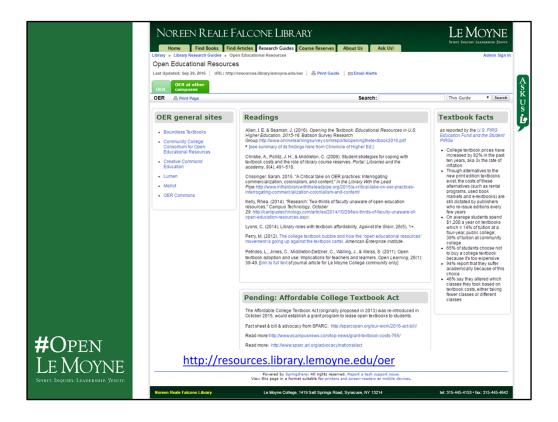
- Open source.
- · Open access.
- · Open society.
- Open education.
- Open data.
- Open government.

Pomerantz, Jeffrey; Peek, Robin. Fifty shades of open. **First Monday**, Vol.21, No.5, Apr. 2016. ISSN 1396-0466. http://firstmonday.org/ojs/index.php/fm/article/view/6360>. doi:10.5210/fm.v21i5.6360.

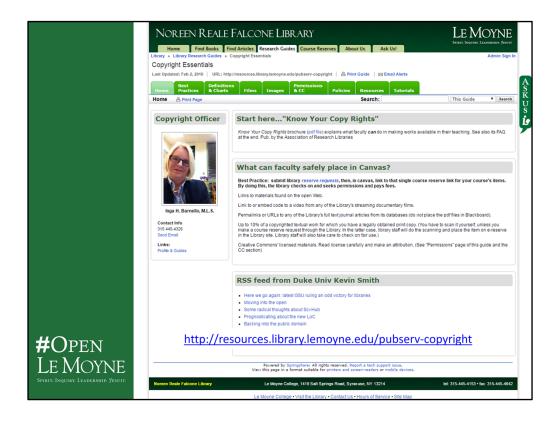


- The term "Open Source" was coined in 1998 as a way to communicate "the pragmatic, business-case grounds" for free software. (Bruce Perens and Eric Raymond, Open Source Initiative). The Free Software Definition (1985) defines the "free" in free software as being about liberty, not price: it is consistent with the principles of free software to sell copies. What makes software "nonfree" (proprietary) is if it restricts any of the four essential freedoms, thereby exerting control over the user. As Stallman writes, "you should think of 'free' as in 'free speech,' not as in 'free beer'."
- "Open Access" is defined most commonly in terms of scholarly literature and has to do (usually) with free online access to written works. Like "open source" before, one way it can accomplish this is through licensing.
- The term "Open Society" was coined prior to World War I, to indicate a society tolerant of religious diversity. A more recent spin is the Open Society Foundations, a philanthropic organization headed by George Soros, to advancing justice, education, public health and independent media by creating open societies in place of authoritarian forms of government.
- "Open Education" -- "sharing is probably the most basic characteristic of education: education is sharing knowledge, insights and information with others,

upon which new knowledge, skills, ideas and understanding can be built" (Open Education Consortium, n.d.). MIT Open Courseware. MOOC (Massive Open Online Courses) s.a. Coursera, Udacity, MITx, etc., OER (Open Educational Resources).



- I'll refer to the Open Educational Resources library guide in lieu of a handout.
- It has a short bibliography of articles about OER as well as a number of useful links.
- Open Educational Resources depend on Open Access.
- But to understand Open Access, you need to understand the basics of Copyright.



- Inga Barnello is the Copyright Officer for the College. She maintains a series of pages
 designed to help faculty with questions regarding the use of intellectual property in
 teaching and research. I'm showing the Copyright Essentials library help guide,
 http://resources.library.lemoyne.edu/pubserv-copyright, but she has many others that
 you might wish to consult.
- Both Inga, myself, and all of the librarians can be found in the Noreen Reale Falcone Library and are available for consultation.



The Library is available to assist faculty, students, and staff who own the copyright to work produced at the College to:

- Understand what U.S. copyright law protects.
- Understand their exclusive rights under the law, and the legal exceptions and limitations on their exclusive rights.
- Manage their copyrights effectively.



- So first principles, you can't talk about open resources without first understanding copyright. And specifically, understanding your role in managing copyright for the works that you create. It all starts with copyright.
- Also, by understanding how copyright applies to your work, it will help you better understand how you can use other author's work in your teaching and research.
- The Copyright Management section is derived from Carnegie Mellon Library's
 "Guidelines on Author Rights and Preservation"
 https://libwebspace.library.cmu.edu/libraries-and collections/Services/Copyright/CMU_AuthorRights_Preservation_Guidelines_May2013.
 pdf

Copyright Management

- In the United States, copyright protects
- "original works of authorship fixed in any tangible medium of expression, now known or later developed, from which they can be perceived, reproduced, or otherwise communicated, either directly or with the aid of a machine or device."
- Copyright does <u>not</u> protect facts, ideas, procedures, processes, systems, methods, concepts, principles, or discoveries, "regardless of the form in which these are described, explained, illustrated, or embodied" in a copyrighted work (U.S.C. 17 §102). http://www.copyright.gov/title17/92chap1.html#102



- Copyright owners should understand what the U.S. Copyright Act protects. Basically, if you create it, you automatically own the copyright.
- Copyright does not protect mathematical or physical observations, including formulas or data derived from observations or calculations. It means that charts of such data in published works might not themselves be protected by the copyright that covers the rest of your book or article.
- Commercial publishers, of course, will be glad to resell your work and, in fact, make a good business licensing works that are probably public domain.



- Copyright owners have the <u>exclusive rights</u> to copy and distribute their work, to perform or display it publicly, and to make derivative works.
- If someone else wants to use the work, the copyright owner's permission is required...
- unless the use is granted by a <u>licensing</u> agreement or an exception or limitation in the Copyright Act e.g., "<u>fair use</u>", TEACH Act, or other exceptions.
 (U.S.C. 17 §106).

http://www.copyright.gov/title17/92chap1.html#106



- Copyright owners should understand their exclusive rights under the law, and the legal exceptions and limitations on their exclusive rights.
- In scholarly works, the right that matters most is attribution you don't want somebody else appropriating your work as their own.
- Fair use is the common exception in teaching you can put a physical book on reserve You can also place a scan of an article or scan of a chapter from a book on reserve.
- The TEACH (Technology, Education and Copyright Harmonization) Act of 2002 expands the scope of educators' rights to perform and display works and to make the copies integral to such performances and displays for digital distance education, making the rights closer to those we have in face-to-face teaching. Section 110(1) of the Copyright Act already provides educators with a separate set of rights in addition to fair use, to display (show) and perform (show or play) others' works in the classroom. These rights are in Section 110(1) of the Copyright Act and apply to any work, regardless of the medium. https://copyright.lib.utexas.edu/teachact.htmlLicensing can extend your rights: You can LINK to entire books from Books24x7 or ProQuest Academic Complete since the library pays for a commercial license that allows just that. You can link to articles in our e-journal and full-text database collections because our licenses allow that. You can't download that book or article and put it in Canvas or email it a colleague.



- Copyright owners can legally <u>transfer</u> their exclusive rights, individually or grouped, to someone else.
- The transfer can be <u>exclusive</u> or <u>non-</u>exclusive.
- With an <u>exclusive</u> transfer of a right, the author <u>loses that right</u> and cannot transfer or license that right to others.
- With a <u>non-exclusive</u> transfer, the author still <u>retains the transferred right</u> and can transfer or license that right to others.



- Scholarship has always been an open process; the idea of open science dates back to
 the very origin of modern science. One of the foundations of the scientific method is
 that all work must be reproducible, and the only way for that to happen is if all
 processes are performed openly.
- The legal scholar Lawrence Lessig has documented the expansion of copyright under U.S. law over the past 40 years. Lessig argues that this expansion, far from promoting "the Progress of Science and useful Arts" (as specified in the U.S. Constitution, Article I, Section 8), actively inhibits it, and that the modern U.S. is becoming a "permissions culture" rather than a "free culture": in other words, that the default legal position is that one must gain permission to make use of a creative work, rather than the default being that one is free to do so.
- The culture of scholarly publication has been to assign copyright exclusively to publishers.
- Open Access wants to overturn this so non-exclusive rights transfers become the new norm.

Copyright Management

- Manage your copyright effectively.
- With rare exception, the interests of authors, academic disciplines, funding agencies, and the College are best served by open access and open licensing.
 - Le Moyne Library encourages authors to be wary of exclusive transfer of their copyrights, particularly to commercial publishers.



• Exclusive transfer of all copyrights to a publisher can yield odd outcomes, for example, authors having to request permission or pay to use their own work.

What is "Open Access"?

• <u>Minimum</u>: content is <u>freely</u> available <u>online</u>



- Firstly, OA materials have to be published in electronic format PDF, Word, LaTeX, etc.
- Secondly, they have to be placed on a networked server i.e., on the world-wide web, on an FTP server, or some other internet server accessible without restrictions without passwords or other DRM to anyone who wants it.

What is "Open Access"?

- <u>Minimum</u>: content is <u>freely</u> available <u>online</u>
- Best: content freely available online
 +

<u>non-exclusive usage rights</u> granted by owner of the work.

- Author defines a license for use.
- Removes two barriers to access: price and permission.



#OPEN

Le Moyne

- In 2002 the Budapest Open Access Initiative issued the first formal declaration on Open Access: referring specifically to scholarly literature, OA is defined as "its free availability on the public internet, permitting any users to read, download, copy, distribute, print, search, or link to the full texts of these articles, crawl them for indexing, pass them as data to software, or use them for any other lawful purpose, without financial, legal, or technical barriers other than those inseparable from gaining access to the internet itself" (Budapest Open Access Initiative, 2002).
- The Bethesda Statement on Open Access Publishing (2003) promotes OA for scientific literature, though with a narrower focus on biomedical research specifically.
- The Berlin Declaration on Open Access to Knowledge in the Sciences and Humanities
 (2003) was written to promote OA for scientific knowledge and cultural heritage broadly,
 and so includes not only scholarly literature, but also data, metadata, source materials,
 and multimedia material.



Rights granted by creative commons

- 1. <u>Attribution</u>: All distributions of a work, and derivative works based upon it, must be credited to the creator of the work.
- 2. <u>No Derivatives</u>: A work may be redistributed, but only "unchanged and in whole;" no derivative works may be made based on it.
- 3. <u>Non-commercial</u>: Derivative work can not be for commercial use.
- Share-alike: Derivative work must be licensed under terms identical to those of the original work.

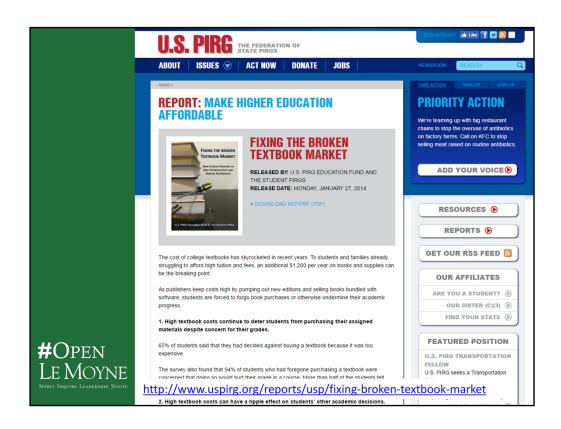
https://creativecommons.org/



- The idea of Creative Commons licensing is derived from Open Source licenses. MIT, GNU, etc.
- Attribution and No Derivatives are straight out of the U.S. Code. Importantly, of all
 the rights articulated in the U.S. Code, these are the only ones that may be
 reserved under a CC license.
- The other two rights articulated by CC licenses (Non-commercial and Share-alike) are restrictions to the first two rights, articulating what the user can or cannot do with derivative works. Share-alike is essentially the same as the concept of "Copyleft;" both restrict the future rights of others.



• Mix and match rights

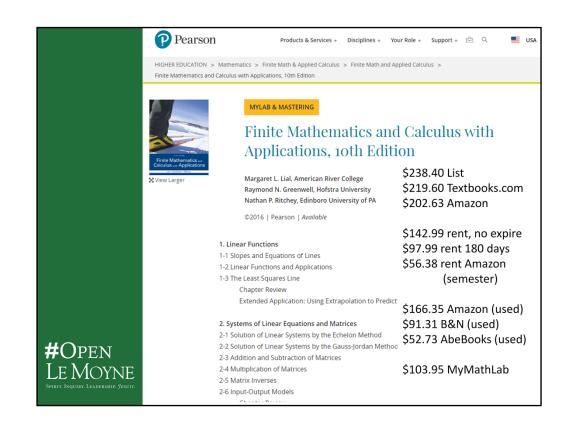


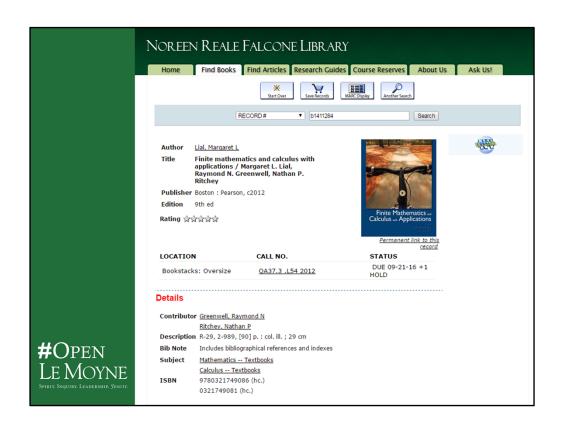


Fixing the Broken Textbook Market

- College textbook prices have increased by 82% in the past ten years – 3x the rate of inflation
- Though alternatives to the new print edition textbooks exist, the costs of these alternatives (such as rental programs, used book markets and e-textbooks) are still dictated by publishers who re-issue editions every few years
- On average students spend \$1,200 a year on textbooks which = 14% of tuition at a four-year, public college; 39% of tuition at community college
- 65% of students choose not to buy a college textbook because it's too expensive
- 94% report that they suffer academically because of this choice
- 48% say they altered which classes they took based on textbook costs, either taking fewer classes or different classes http://www.uspirg.org/reports/usp/fixing-broken-textbook-market









- Open Educational Resources
 - Educause OER resources (2016)
 http://tinyurl.com/educause-oer-2016
 - Open Textbooks textbooks released with some sort of CC or PD license.
 - "Opening the Textbook: Educational Resources in U.S. Higher Education, 2015-16" (Babson Survey Research Group, 2016) http://www.onlinelearningsurvey.com/



- Survey of 3,000 full-time and part-time professors
- Awareness of free or openly licensed educational resources, including textbooks and other teaching materials, has increased slightly over the past year, but still only 6.6 percent of faculty members are "very aware" of them.
- 87 percent [of faculty surveyed] said the cost to the students had been important or very important to them. But the survey also found that only about 5 percent of those professors had assigned a free or openly licensed textbook.
- professors who teach large-enrollment introductory courses were adopting openly licensed materials at twice the rate of the general faculty population
- perceived barriers to using the materials: 49 percent said "there are not enough resources for my subject"; 48 percent said it is "too hard to find what I need"; and 45 percent said "there is no comprehensive catalog of resources."
- Source: Blumenstyk, Goldie . More Professors Know About Free Textbook Options, but Adoption Remains Low. Chronicle of Higher Education, July 26, 2016. http://chronicle.com/article/More-Professors-Know-About/237252



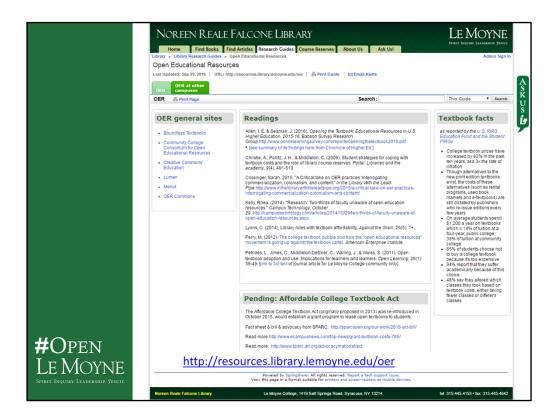
#OPEN

Opening the **Textbook**

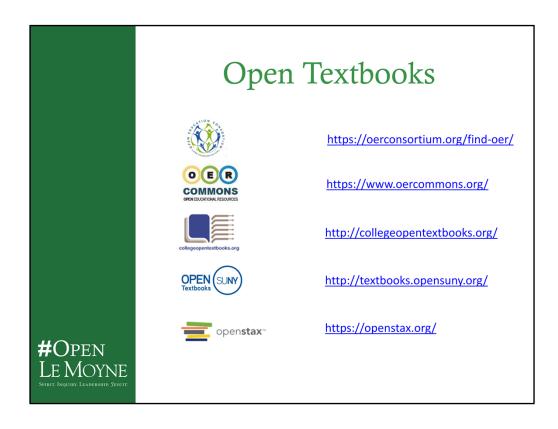
- Survey of 3,000 full-time and part-time professors
- Increased awareness in past year, but only 6.6% of faculty are "very aware" of OER textbooks.
- 87% said cost to student very important, but only 5% of them had assigned an open textbook.
- Large enrollment classes adopting twice the rate of general faculty population.
- Perceived barriers:
 - Not enough resources for my subject (49%)
 - Too hard to find what I need (48%)
 - No comprehensive catalog of resources (45%)

http://www.onlinelearningsurvey.com/

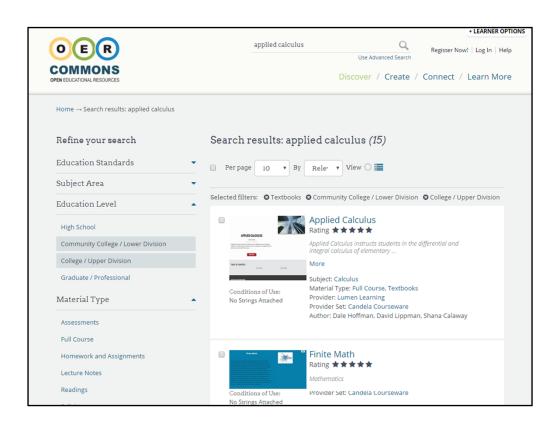
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- Source: Blumenstyk, Goldie . More Professors Know About Free Textbook Options, but Adoption Remains Low. Chronicle of Higher Education, July 26, 2016. http://chronicle.com/article/More-Professors-Know-About/237252



• There may not yet be an answer to the supposition that there are "not enough resources for my subject" but there are ways to find out what exists.



- Open Education Consortium aimed at community colleges but useful for all. Lots of good finding aids. MIT is a sponsor. 300 higher education institutions and related organizations have freely shared many thousands of courses, open textbooks and other resources, and collaborated to foster widespread adoption of OERs.
- College Open Textbooks partnership with Open Education Consortium . 750+ open textbooks with 150+ content or accessibility reviews.
- OpenSUNY -- leverages the expertise of the SUNY campuses that are successfully using OER. 17 textbooks, but growing.
- Open Stax a nonprofit based at Rice University, with mission to improve student access to education. 20+ books K-12 and college.
- WikiBooks "open-content textbooks collection that anyone can edit."



COURSE OVERVIEW

This course is based on Applied Calculus, by Shana Calaway, Dale Hoffman, and David Lippman. The full textbook can be downloaded for free here. Students will learn to apply calculus in economic and business settings, like maximizing profit or minimizing average cost, finding elasticity of demand, or finding the present value of a continuous income stream. Additionally students will apply calculus in life and social science settings, like determining the rate at which drug concentration in the body is changing, or exploring the rate at which a subject learns.

Some of the differences between the content in this course and a calculus course for engineering, science or math majors is:

- · No trigonometry
- The applications are different
- · Fewer theorems, no proofs

COURSE ACCESS

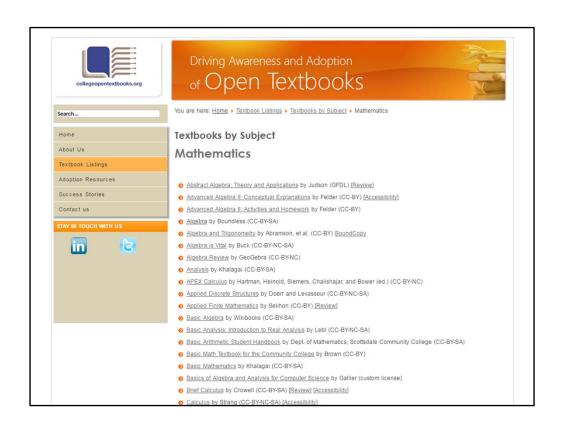
The course materials and on-line homework sets are housed in MyOpenMath. You can access the course as a guest student to see how the course is set up and view the online homework system, simply enter the username "guest" – no password required. Should you choose to use this course, MyOpenMath can be integrated into your school's LMS for ease of access.

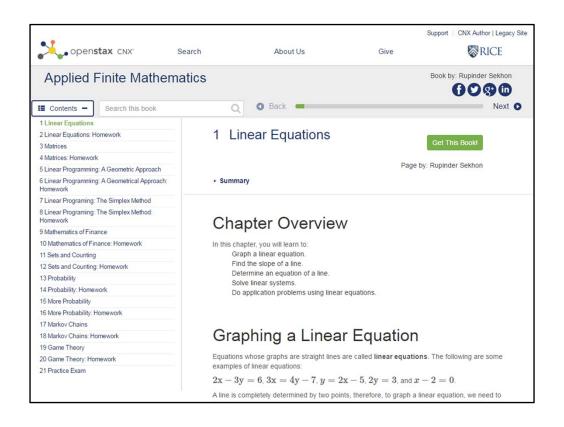
REQUESTING AN INSTRUCTOR ACCOUNT IN MYOPENMATH

If you would like to use MyOpenMath in your classroom, you can request an instructor account through the MyOpenMath homepage. Select "request an instructor account" at the bottom of the page. Give us a couple days to verify that you are an instructor at an accredited institution. MyOpenMath generates an automated email when your account is verified, but sometimes it will end up in your junk email or won't make it through the filters set by your institution. To avoid this, you can check your junk folder or ask your institution to let mail from do-not-reply@nyopenmath.com through.

If you already have an instructor account in MyOpenMath, you can view the instructor version of the course.







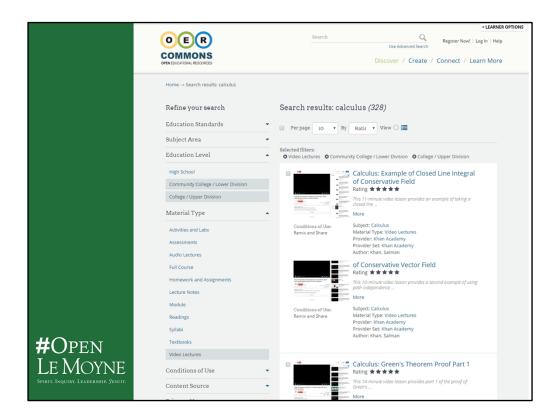


- Activities and Labs
- Assessments
- Audio Lectures
- Case Study
- Data
- Full Course
- Games
- Homework and Assignments
- Images and Illustrations
- Instructional Material
- Interactive
- Lecture Notes

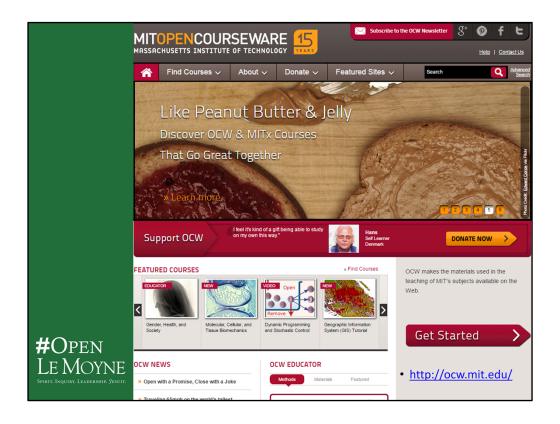
- Lesson Plans
- Module
 - Primary Source
 - Readings
- Reference
- Resource Review
- Simulations
- · Student Guide
- Syllabi
- Teaching and Learning Strategies
- Textbooks
- Unit of Study
- Video Lectures



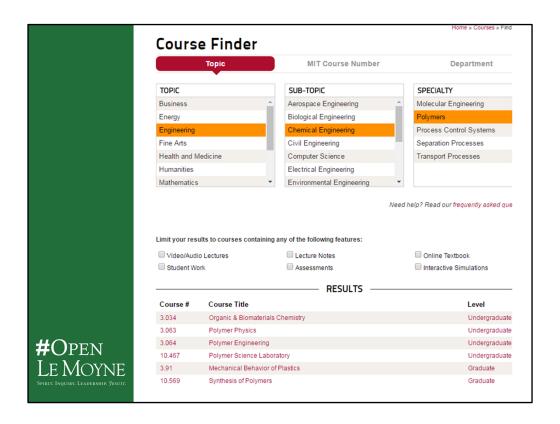
- Although the conversation lately has centered on open textbooks, OER has a deeper heritage than that.
- Open Courseware was the original conversation starter, and includes many more educational components than just textbooks.



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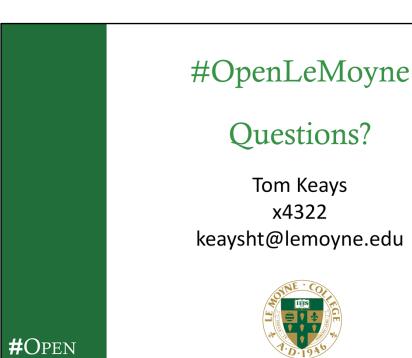
- MIT OCW http://ocw.mit.edu/
- 2340 courses, all 5 schools, 33 academic units. 120 new courses a year.
- Textbooks, syllabus, class notes, full online classes including videos. MOOCs (MITx / EdX) that you can self-enroll in or pay to take for credit.
- Source: http://news.mit.edu/2016/mit-opencourseware-celebrates-15-years-open-sharing-0404



- MIT's Course Finder lets you browse by topic, course number, and department.
- Limit results by online lectures, lecture notes, online textbook, student work, assessments, interactive simulations.

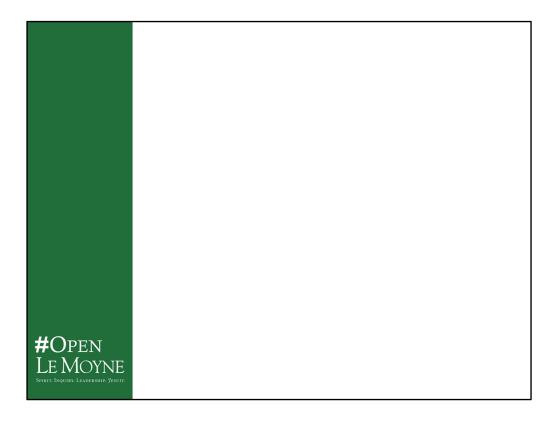


- The MERLOT project began in 1997, when the California State University Center for Distributed Learning (CSU-CDL at www.cdl.edu) developed and provided free access to MERLOT (www.merlot.org).
- Now has contributors from all over the world.



• The Library is here to help you with your teaching and research.

LE MOYNE



• OA Policy – for instance, would give a better context for subsidizing Article Processing Costs (APC) and specifying the types of items that will be subsidized.



- Two things that would increase the success of Open Access at LMC:
 - 1. Open Access Policy
 - Mandate open access by LMC authors
 - The Senate working with the Provost
 - Subsidizing Article Processing Charges
 - 2. Institutional Repository
 - Showcase for Le Moyne scholarship
 - Provost Office and the Library



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