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Our Educative Reticence: A Grounded Theory of Instructors’ Not Adopting Open Textbooks

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OUR EDUCATIVE RETICENCE: A GROUNDED THEORY OF INSTRUCTORS’ NOT ADOPTING OPEN TEXTBOOKS

A Dissertation
Presented to
the Graduate School of
Clemson University

In Partial Fulfillment
of the Requirements for the Degree
Doctor of Philosophy
Learning Sciences

by
Jonathan William Lashley
May 2019

Accepted by:
Dr. D. Matthew Boyer, Committee Chair
Dr. Cynthia Haynes
Dr. Phillip Wilder
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ABSTRACT

The Open Textbook Network (OTN)—an organization based out of the University of Minnesota and comprising over 1,000 postsecondary institutions—supports the open education movement by facilitating in-person workshops about, sharing training resources for, and curating a library of peer-reviewed open textbooks. Its efforts are meant to build awareness of open education among attendees by teaching them about the positive potential of open textbooks in addressing the rising costs of attending college, waning public investment in higher education, increasing pedagogical dependence on the course materials of commercial publishers, and curbing other barriers to affordability, access, and equity in higher education. While many instructors who have attended OTN workshops went on to review and adopt open textbooks in their course or, at least, leave the experience with an intent to explore open textbook use in the future, a small population (n=76) openly admitted to having no interest in open textbooks. The following manuscript recounts the study of this previously unresearched population of nonusers. Leveraging grounded theory methods based in values coding (Saldaña, 2009) and situational analysis (Clarke, 2005), this exploratory, interview-based study derived a new theoretical explanation for the motivating values of modern educators that informed their sentiments toward adopting new instructional tools and techniques—like those aligned with open education. The resulting theory of educative reticence posits that faculty members recognize how disclosure of their instructional practices—no matter how favorable they might be for teaching and learning—makes them accountable to the professional development outcomes, institutional standards, and disciplinary expectations.
of others. In this specific case, instructors who indicated disinterest in open textbook adoption were likely to veil their exploration of alternative (even equivalent) means for reaching desired technological outcomes.
DEDICATION

For Viv.
ACKNOWLEDGMENTS

After six years of doctoral study, various career moves, a couple of fellowships, and a cross-country move, many people have inspired the work that I present here. I thank Matthew Boyer, my advisor, for recognizing that my interests could play well beyond the Humanities and scaffolding my expectations for learning, teaching, and researching in Learning Sciences. He introduced me to John Hilton, whose mentorship in empirical research redefined my career in higher education and introduced me to the broader open education community. No person has more greatly influenced my professional development as a teacher, writer, and thinker than Cynthia Haynes, who continues to challenge me as much as she honors me as her mentee, colleague, and friend. I met Phillip Wilder during a time of high uncertainty in both my professional and personal lives, and I thank him for his probing questions, critical listening, and unconditional support—all of which helped me persevere in my Ph.D. program. Always an unofficial member of the committees that oversee my student work, I am grateful for my partner, Colleen, who encouraged me to pursue a doctorate in the first place.

This particular study could not have been possible without the support of the Open Textbook Network (OTN) and, specifically, David Ernst. His advocacy of my project opened a conversation about faculty support that has not otherwise been addressed by our community. Thank you to Sarah Cohen for recruiting me as a faculty presenter for the OTN and awakening my voice as an advocate for open education. Barry Stehlik, Karen Lauritsen, and Mark Sheaves are sources of stability for me and others who work with the OTN, and I so admire the example that they set for higher education.
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Finally, the scope and value of this study directly relate to my ongoing conversations with people from various disciplines and organizations. The following colleagues deserve recognition for their influence over my thinking: Andy Wesolek, Kirsten Dean, Anne Langley, Rob Nyland, Amber Sherman, Amy Collier, Josh Herron, Kristen Gay, Deana Brown, Christina Hendrix, Nicholas Colvard, Jamison Miller, Todd May, Sean Morey, Patrick Lowenthal, Serena Henderson, Alesha Baker, David Reinking, Leslie Salley, Scott Stevens, Alyson Indrunas, and Witt Salley. Thank you all.
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CHAPTER ONE
A STUDY OF OPEN TEXTBOOK NONUSERS

(1) Everyone has the right to education. Education shall be free, at least in the elementary and fundamental stages . . . Technical and professional education shall be made generally available and higher education shall be equally accessible to all on the basis of merit. (“Universal Declaration of Human Rights,” 1948, Article 26)

Adopted by the United Nations General Assembly in 1948, the Universal Declaration of Human Rights (UDHR) recognized “the equal and inalienable rights of all members of the human family” and decreed that every individual “shall strive by teaching and education to promote respect for these rights and freedoms and by progressive measures, national and international, to secure their universal and effective recognition and observance” (Para. 10). Across its 30 articles, its drafters—chaired by Eleanor Roosevelt and comprising academics like P.C. Chang, Rene Cassin, and Charles Malik—articulated the unconditional rights to which every human being is entitled. In the context of advancing globalization after World War II, this sort of agreement was a first (Bailey, n.d.). Concerning education, as referenced in the passage I cited above and refined in the epigraph atop this chapter, teaching was considered the primary means by which others would learn of and maintain these freedoms. Given the proclaimed right that every person has to a free, fundamental education, the drafters’ assumptions have proven apt in its delivery as an educational resource over time: the UDHR set a world record for the sheer number of its crowdsourced translations and, to date, has been translated into 512 different languages and made available digitally in portable digital formats (United
Nations Office of the High Commissioner for Human Rights, n.d.). Just because the document is immediately accessible to many, however, does not mean it occupies a place in every home or an active presence in the lives of every literate person.

Fifty-four years later, the United Nations Educational, Scientific, and Cultural Organization (UNESCO) convened a Forum on the Impact of Open Courseware for Higher Education in Developing Countries. In association with the William and Flora Hewlett Foundation and the Western Cooperative for Educational Telecommunications (WCET), the seventeen participants who attended sought “to develop together a universal educational resource available for the whole of humanity, to be referred to henceforth as Open Educational Resources” (UNESCO, 2002, p. 6). Their recommended definition for Open Educational Resources (OER), imagined a reality in which learning materials

---

1 When referencing OER, I do so in consult of an earlier Hewlett Foundation definition of OER (Hewlett Foundation, n.d.) that was employed by the questionnaire that Seaman and Seaman (2017) designed for their large-scale survey of faculty across the United States. Because my pre-interview questionnaire adapted questions from their instrument (Appendix A), I used the same earlier definition that considers OER to be "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" (Seaman & Seaman, 2017, p. 5). The most recent Hewlett definition reads, "Open Educational Resources are teaching, learning and research materials in any medium – digital or otherwise – that reside in the public domain or feature an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions" (Hewlett Foundation, n.d., para. 7). This updated definition proves more descriptive than the previous iteration in the areas of content delivery, non-commercial access, and transformative use permitted under open licensing. I restrain understanding of OER under the earlier, more abstract definition, however, because that is what my study offered participants.
could be accessed\textsuperscript{2}, used, and modified for non-commercial purposes by way of open\textsuperscript{3} licensing and networked information technology (p. 24). This new reality, however, would also concede that humans had done an insufficient job of shepherding the vision of the UDHR. As UNESCO’s Assistant Director-General for Communication and Information concluded during the UNESCO forum, "We need to see how to bring knowledge to people who need it so badly; we don’t do that so well now" (p. 6). With OER, like any technology\textsuperscript{4}, those participating in the UNESCO forum could (and did) recommend best practices for sharing, accessing, evaluating, updating, and indexing content for others to use (p. 24). Additionally, support structures could emerge around obtaining and disseminating the technology—a cause that has since been taken up by

\textsuperscript{2} The accessibility of an open textbook primarily refers to free-of-charge, day-one availability of its educational content thanks to open licensing. Accessibility, as it relates to concepts like Universal Design for Learning (UDL) (CAST, n.d.), where content is available in formats that all learners may access (e.g., via screen reader for those with vision impairments), is not yet assured for all educational content (open and commercial alike). That said, open licenses sponsor community-driven approaches to adapting content to accommodate special needs (e.g., captioning videos for those with hearing impairments) that traditional copyright does not allow. Access remains an issue for OER, however, regarding online hosting and source code availability (Wiley, 2007). Unless otherwise specified, the “accessibility” of OER is discussed in reference to one’s ability to access materials.

\textsuperscript{3} As will become apparent in my literature review, definitions for the term "open" remains contentious. The discussions that follow set a foundation in David Wiley’s (2016, November 07) ongoing musings about the matter since he is a central figure in defining open digital content to begin with. Wiley has reformulated a working definition for "open" in two parts: (1) the creative content should be free of cost and (2) clearly identify the extent of permitted use. From his older, more contentious "free + permissions" to his newer, more politically palatable definition "a free granting of permissions," Wiley consistently promotes the idea that sense of civic responsibility should undergird the creative content that a person decides to openly license.

\textsuperscript{4} My understanding of technology derives from the Greek term, "techne," which the Oxford English Dictionary defines as "[a]n art, skill, or craft; a technique, principle, or method by which something is achieved or created" (Techne, n.d.). Reverence for this etymological root as well as a background in composition studies further encourage me to accept Ong's (1985) declaration that “[w]riting is a technology that restructures thought” because “[w]ithout writing, the literate mind would not and could not think as it does, not only when engaged in writing but even when it is composing its thoughts in oral form” (p. 24). OER satisfy a similar role (as does any educational resource) regarding the ways in which they mediate educational content. Though this understanding is perhaps broader than the interfaces, devices, and tools that we popularly deem “technology,” all demand certain technical literacies as a precondition for use.
both nonprofit and for-profit entities in the forms of digital repositories [e.g., OER Commons (oercommons.org) and Top Hat Textbook (tophat.com/textbook)], active learning platforms [e.g., Lumen Learning’s Waymaker platform (lumenlearning.com/what/waymaker) or Cengage’s OpenNow platforms (cengage.com/institutional/opennow)], and publishing initiatives [e.g., OpenStax (openstax.org) or the Rebus Foundation (rebus.foundaion)]. Just because an available technology is well supported, however, does not mean it will appeal to users.

Even more recently, in 2007, the Open Society Institute and the Shuttleworth Foundation convened a meeting of “open education activists” in Cape Town, South Africa. Those who attended jointly authored the Cape Town Open Education Declaration: Unlocking the Promise of Open Educational Resources to recognize how the “emerging open education movement combines the established tradition of sharing good ideas with fellow educators and the collaborative, interactive culture of the Internet,” that such activities engender the “belief that everyone should have the freedom to use, customize, improve and redistribute educational resources without constraint” (Cape Town Open Education Declaration, 2007, para. 2). In the declaration, contributors marketed three strategies for increasing the reach and impact of OER: (1) encouraging educators and learners alike by rewarding them whenever they promote OER use and creation as integral educational practices, (2) calling on all educators and educational institutions to openly-license their resources in an effort to share knowledge broadly in formats that are both directly editable and accessible for all, and (3) imploring governing bodies to prioritize open education through policy and taxpayer-funded initiatives (para.
In defense of these strategies, the authors of the declaration claim that such investments make sense for everyone in education:

They will make it possible to redirect funds from expensive textbooks towards better learning. They will help teachers excel in their work and provide new opportunities for visibility and global impact. They will accelerate innovation in teaching. They will give more control over learning to the learners themselves.

(Para. 10)

Just because these educational investments make sense for everyone, however, does not mean that everyone will make immediate sense of OER-based teaching and learning.

**Introduction to the Study**

The work of the Open Textbook Network (OTN), an organization based out of the University of Minnesota’s College of Education and Human Development, builds and delivers faculty training resources that support the principles put forward by the various figures, meetings, and declarations mentioned above. Through its efforts in building awareness about open alternatives to traditional textbooks, the OTN claims to

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5 For clarity, I consider a faculty member to be anyone who teaches college-level courses and is thus qualified to attend the OTN faculty workshop and subsequently complete an open textbook review for the OTL if she chose to do so. I, therefore, emphasize the educational work of faculty as denoted in labels like "educator," "teacher," or "instructor," and not in service to the formal titles earned as part of tenure, promotion, or hiring situation. Not all study participants’ values align with this practice, however. One tenured faculty member, in particular, was quick to correct my referring to her (across this manuscript, I de-identify the genders of all interviewees under the pronouns she/her) as an "instructor."

6 As a genre of educational resource, the form and function of textbooks is a mainstay of postsecondary instruction. Norm Friesen (2017), citing the musings of Thomas Kuhn, recognizes how the content of a textbook "is much more about the standard paradigms and problem-solutions of the discipline than any one author’s unique point of view" (Friesen, 2017, loc. 2816). These compositions synthesize large swaths of disciplinary knowledge into a single package for readers to digest. Though some instructors and programs
promote "access, affordability, and student success through the use of open textbooks" and, under this mission, have garnered a membership that is nearly 1,000 post-secondary campuses deep (Open Textbook Network, n.d.-A; S. Cohen, personal communication, February 1, 2019). Perhaps best known for its Open Textbook Library—an OER itself which refers its visitors and would-be-adopters to reputable (often peer-reviewed) open textbooks—and workshops that affiliated representatives from other institutions help facilitate at member campuses, the OTN also provides support to the larger open education community by way of hosting webinar-style office hours with the Rebus Foundation, collaborating with other open education organizations like Brigham Young University’s Open Education Group (openedgroup.org) in authoring support guides for

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7 When a faculty member adopts a textbook, they assign readings from the text to students. It may be that the content aligns with learning outcomes, provides relevant examples to aid instruction, or supplements educational content delivered via some other means. Thus adoption of course materials—of which open textbooks are one form—falls on a continuum: on one end, an instructor may require the full use of a single textbook while, on the other end, optional readings come from a variety of disciplines, authors, and sources.

8 Given the focus on peer review procedures as designed by the OTN, "peer review" in this manuscript means something more immediately literal than it might in academic publishing where more complex structures (e.g., blind, double-blind, open review, et al.) constitute some level of quality assurance during the publication process. In the context of this study, "peer review" refers to the process by which faculty who attend OTN workshops serves as subject matter experts in their review of an open textbook featured in the OTL.

9 Open textbooks—a form of OER—are free of cost and identify intended use by way of an open license. This study focuses on open textbooks specifically advertised by the OTL, with the assumption that materials curated in that online location exclusively (or at least primarily) constituted the understanding of "open textbooks" for study participants. The course materials featured in the OTL meet certain criteria in addition to their "openness": (1) the full textbook must be available "as a complete portable file (e.g. PDF, ePub);" (2) multiple higher education institutions or groups "affiliated with a higher education institution, scholarly society, or professional organization" must be actively using the open textbook; and (3) the source of the textbook is its original author or publisher (unless there "are modifications that reflect the needs or context of an entirely new audience" like language-, culture-, profession-based revisions (Open Textbook Library, n.d.). Open textbooks do not always meet these criteria, and so the OTL does not feature all that exist online.

10 I have served as one such affiliate faculty presenter since spring 2017.
OER-related endeavors, and sponsoring the development of all-new open textbooks (Open Textbook Network, n.d.-B). Integral to these efforts is a commitment to teaching the educational community about the merits of using OER in general, not just open textbooks in particular.

Institutions and consortia that join the OTN receive in-person training about open textbooks from open education experts from across the United States, access to slide decks for facilitating ongoing faculty and support staff workshops, leadership development opportunities including participation in intensive OTN summer institutes, research and reporting tools like institution-specific data dashboards for tracking open textbook adoptions, promotional rates for purchasing relevant educational technologies such as Pressbooks (pressbooks.education), and access to an active online community of open education leaders (Open Textbook Network, n.d.-B). These services are positioned to educate and engage the broader academic community about the potential and actual impact of investing in open textbooks. Further, it is through these services that faculty are educated about the stakes of open textbooks in modern education, are made aware that their expertise is needed in evaluating pre-existing materials, and introduced to a platform—the OTL—for publishing peer reviews that may serve as OER for would-be adopters to consider when comparing an open textbook to its commercial counterpart(s).

While campus representatives may deliver subsequent workshops after an OTN visit, the content of each presentation likely remains consistent with the OTN's master slide deck, *Open Textbooks: Access, Affordability, and Academic Success* (Ernst, 2019). A part of this model worth noting is that institutions typically incentivize participation by
way of small stipends—the OTN recommends $200 (Cohen, 2019)—or other awards for faculty who both attend training and review an open textbook in the OTL (S. Cohen, personal communication, January 3, 2018). Though the practice of rewarding engagement with monetary stipends is consistent with other faculty training initiatives in higher education, it seems important to consider how incentivizing faculty here presupposes that efforts in learning about, writing reviews for, and potentially adopting open textbooks are not themselves inherently worthwhile activities. For faculty who are satisfied with their current (presumably commercial) textbooks, perhaps it is not worth considering open alternatives without an incentive. Further, even with this incentive in tow, some faculty who go through the OTN’s training and review process opt not to use open textbooks. Smaller still is the subset of faculty workshop attendees who, in a follow-up survey for the workshop, openly acknowledged that they had no intention of using open textbooks; such instructors are the subjects of this study.

Problems in Accounting for Faculty Learning/Development

Revisiting the opening paragraphs of this chapter, specific gaps exist among the three efforts mentioned (the United Nation’s UDHR, the UNESCO forum, and the Cape Town Declaration) and these oversights may further be applied to OER adoption: (1) for the UDHR, the availability of a resource—even the UDHR itself—does not guarantee its use or favor among a targeted population, (2) UNESCO’s assurances of support infrastructure do not ensure that faculty will use optional technologies like OER, and (3) even though educational investments in OER may seem sensible for the authors and
many of the readers of the Cape Town Declaration, there are competing sensibilities that have kept OER from breaking through and overtaking commercial counterparts. To a certain extent, however, many of the OTN's resources seem to address these impasses.

Where the intentions of those who authored and since translated the UDHR may be problematized by cases in which educational materials are available unbeknownst to potential users, the OTN workshops and library function in tandem to meet users where they are and walk them through the current stock of quality-assured\textsuperscript{11} resources produced by the open education movement. In situations where UNESCO-like recommendations make technologies like OER easily available but do little to curb uncertainty about how or why one might use non-essential technology, the OTN scaffolds OER-based practices to introduce the degree to which open textbooks subsidize familiar academic practices around vetting course materials and aligning content to instruction. Finally, if the sort of policies and investments that the Cape Town Declaration advances have gone unnoticed by a given academic community, the OTN sponsors a broader “community of practice” by which a social system of people from across higher education share information about their advocacy as part of the open education community and learn how to better support each other through regular, dynamic negotiation of shared priorities (Wenger, 2010).

From a professional development standpoint, the building of such a community makes

\textsuperscript{11} Determinations of open textbook quality are tied to faculty perception (i.e., how an open textbook seems to function relative to a commercial counterpart). Since textbooks featured in the OTL position comprehensiveness, accuracy, relevance/longevity, clarity, consistency, modularity, organization/structure/flow, interface, grammar errors, cultural relevance, and reviewer comments as meaningful realms of inquiry for subject matter experts to consider regarding quality. Any references to textbook “quality” in the following chapters recognizes these factors as important designations of value for textbooks (open or otherwise).
sense because “one’s work and one’s professional development are inextricably entwined with those with whom one works” (Schlager & Fusco, 2004, p. 124). While awareness about OER may logically scale up under such conditions, training takes time, access to the community varies, and a common question remains: why do we—colleagues who supportively influence instructors’ relationships with curricular and technological resources—struggle to convince faculty that OER is worthwhile to adopt? General answers to this line of questioning have tended to derive from large scale surveys of faculty (Bell, 2018; Mishra, 2017; Seaman & Seaman, 2017\(^\text{12}\)) and students (Florida Virtual Campus, 2016; Jhangiani & Jhangiani, 2017; Senack & Donoghue, 2016) about the myriad responsibilities, perceptions, and experiences that arise from their use of OER.

An increasing number of educators have adopted open content in their courses to reduce the cost of course materials (Wiley, Hilton, Ellington, & Hall; 2012), promote better learning outcomes for at-risk student populations (Colvard, Watson, & Park; 2018), and instigate more sustainable access to course materials (Lashley, Cummings-Sauls, Bennett, & Lindshield, 2017). Unsurprisingly, these populations—faculty and students who use OER—are the go-to targets of empirical research about OER. Observing and consulting those educators who have actually implemented open resources in their instruction seems vital when evaluating the success of an OER-based intervention. And, indeed, self-reported data sets related to cost savings, documented use, learning

\(^{12}\) Seaman and Seaman published a report for their 2017–2018 study of OER in higher education during the drafting of this manuscript. Because the findings of the updated report are consistent in many ways with its predecessor, references to the ongoing study, its design, and its findings currently draw from the 2015–2016 report.
outcomes, and user perceptions of OER are not difficult to draw from a population that is deliberately navigating primarily online experiences. We learn the implications of OER adoptions by monitoring their use in real educational contexts, and we have generally learned that a “strong majority” of student and faculty users consider OER to be just as good if not better than traditional textbooks (Hilton, 2016, p. 584). As Hilton found in his meta-analysis of 16 empirical studies of OER implementation, “The decision to employ OER appears to have financial benefits to students (and the parents and taxpayers who support them) without any decrease in their learning outcomes” (p. 588). Because of this, he suggests that “researchers and educators may need to more carefully examine the rationale for requiring students to purchase commercial textbooks when high-quality, free and openly-licensed textbooks are available” (Hilton, 2016, p. 585). As open textbooks lead instructors to question the price tag of commercial alternatives, these instructors may likely develop a more critical and deliberate relationship with the texts that they choose to assign. But still, not all instructors who learn about OER adopt it.

Where a focus on actual and perceived use is practical for developing better faculty development strategies, it does not necessarily lead to meaningful insights about why some populations might spurn the use of OER or how the logical appeals of OER fall short for some would-be adopters. The Babson Survey Research Group’s report *Opening the Textbook: Educational Resources in U.S. Higher Education* by Seaman and Seaman (2017) goes a long way toward capturing a general picture of how higher education faculty regard OER year-over-year. In their representative survey of 2,700 faculty members from across the United States, the authors of the study reaffirm many of
the findings from their previous reports: most instructors are unaware of OER and Creative Commons, many think there are not materials that suit their needs or that the texts are too hard to find, and faculty are generally concerned about the viability of OER as a supported technology long-term (p. 29). While these findings have grown more favorable for advocates of open education in each subsequent update to the study, the survey exhibits limitations that are similar to those found in the much shorter OTN follow-up survey: data is at the mercy of the volunteered perspective of either faculty who have broadly adopted OER or those who have not for whatever reason. A more granular, yet meaningful population to identify would be those whose reasons to not adopt OER are legitimized by their training in topics related to open content and, by association, Creative Commons licensing. Research has not yet accounted for instructors in such a position.

A lack of research about nonusers is, perhaps, expected when empirical studies of OER efficacy\(^\text{13}\) predominantly focuses on the experience of those who have actively used this technology to replace or supplement more conventional (likely commercial) educational resources [see Hilton (2016) for a review of such research]. Additionally, since nonusers evade those identification and tracking mechanisms that would otherwise generate user data, accounting for those who make up this population and their

\(^{13}\) Efficacy research related to OER often measures the change in affordability, student learning outcomes, user behavior, and student/faculty perception when assessing the effectiveness of an OER-based intervention. Appropriately, many of these studies look to the COUP—Cost, Outcomes, Use, and Perception—for direction (Bliss, Robinson, Hilton, & Wiley, 2013). In observation of the COUP frameworks influence on research, discussions of OER efficacy that I raise in the following chapters, evidence of lowered costs, improved outcomes, meaningful use, and favorable perceptions of users is being considered.
educational activities is difficult if not impossible outside of voluntary participation in surveys, focus groups, and so on. As OTN staff members have found in response to the brief follow-up survey that they send to faculty who participate in their workshops, however, not all members of a population will pursue voluntary self-reporting. Though response rate for the OTN follow-up survey (Table 1.1) has been stable around 74 percent (D. Ernst, personal communication, October 28, 2018); data for the other 26 percent is missing. The significance of this gap is apparent in the scope of the follow-up survey’s three lines of inquiry: (1) familiarity with open textbooks and their use before the workshop, (2) intentions for open textbooks after the workshop, and (3) confirmation of whether the faculty member completed an OTL review or not.

Table 1.1. Open Textbook Network 30-Second follow-up survey questions

<table>
<thead>
<tr>
<th>Before attending the workshop...</th>
<th>Yes (1)</th>
<th>No (2)</th>
</tr>
</thead>
<tbody>
<tr>
<td>I had heard of Open Textbooks.</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>I knew that Open Textbooks could be freely used, adapted, and distributed.</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>I knew that Open Textbooks could significantly reduce higher education costs for students.</td>
<td>o</td>
<td>o</td>
</tr>
</tbody>
</table>

Before attending the workshop, I had done the following with Open Textbooks
(select all that apply):
- Examined an Open Textbook.
- Written a review of an Open Textbook.
- Adopted an Open Textbook.
- Modified an Open Textbook.
- Authored an Open Textbook.

After attending the workshop, how likely are you to:

<table>
<thead>
<tr>
<th></th>
<th>I do not plan to do this</th>
<th>I’m undecided if I will do this</th>
<th>I plan on doing this in the future</th>
<th>I have done this since attending the workshop</th>
</tr>
</thead>
<tbody>
<tr>
<td>Examine an Open Textbook</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Adopt an Open Textbook</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Modify an Open Textbook</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
<tr>
<td>Author an Open Textbook</td>
<td>o</td>
<td>o</td>
<td>o</td>
<td>o</td>
</tr>
</tbody>
</table>

If you plan to adopt an open textbook...
- What semester will this occur? e.g., Fall 2014
- For which course(s) will this occur? e.g., HIST 1001, PHYS 2014
- Are any of your colleagues planning to adopt an open textbook, too? Please name them.
The choices presented in the first and last lines of pursue binary understanding whether or not, prior to the workshop, attendees had “heard of open textbooks,” knew that these materials could be “freely used, adapted, and distributed,” were aware that they could “significantly reduce higher education costs,” performed any tasks related to the open nature of these materials (e.g., sharing, writing, revising, etc.), and reviewed open textbooks formally. While qualities raised here may be all that is necessary to capture general characteristics about the faculty attending training and reviewing textbooks, the yes-no responses of survey participants do little to indicate the depth and conditions of prior knowledge that motivated them to attend the workshop in the first place. Despite consistent content across all presentations, attendee experiences while attending the workshop and completing OTL reviews could vary dramatically depending on the values and experience that they brought to their sessions and, additionally, in ways that are unaccounted for by the one of two choices that they volunteer post hoc. The other line of questions—faculty intentions for open textbooks after attending the workshop—asks survey respondents to indicate their likely action on a Likert scale of options. But even
the response of “I do not plan to do this” that ultimately identified the participants of my study offers little insight as to why this is the plan the wish to record. As survey instruments employ predetermined response options and scales, regardless of validation, critics may wonder about the accuracy of such narrow responses in capturing the complexities of an instructor’s position about her own identity as a learner, colleague, educator, and person—the last of which is, as I will point out in the following chapter, important for tracing the values that motivate one’s activities. While we might increasingly assume that there is a logic for faculty to use OER, especially when many prominent options resemble the familiar forms and exhibit comparable quality standards of commercial counterparts, the importance of studying adopters and non-adopters alike seems worthwhile if only because doing so recognizes that there is legitimate reasoning to be found on either side. Additionally, a shift in focus to nonusers might show the extent to which our pursuit of sanctioned, institutionally-sound use cases for technology may be dogmatic and ultimately demoralizing to those who reject it. In faculty development, we miss engaging 100 percent of the faculty we dismiss for not learning what we consider to be appropriate use.

References to "values" in this study derive from Saldaña's breakdown of values coding as a method of coding in qualitative research. In values coding, a researcher examines the values, attitudes, and beliefs evident in the responses of study participants. Because I employed values coding when reviewing interview transcripts as part of this study, any references to motivational values imply the values, attitudes, and beliefs that influence the thoughts, words, and actions of a person.
**Purposes of Studying OTN-Trained Faculty**

As of writing this manuscript, faculty have written over 2,000 reviews of the more than 500 books featured in the OTL (Cohen, 2019). Two-thirds of faculty who attend an OTN workshop go on to review an open textbook, and 81 percent of reviewers have found these OER to be four-star quality or above relative to comparable course materials (Ernst, 2019). Considering that the OTL has attracted more than 2 million visitors during its six years as an online resource, it seems fair to say that the OTN, its library, and its approach to faculty development have found sustained prominence in shaping advocacy and adoption of OER. There is a contingent of faculty workshop attendees who have emerged in post-workshop surveys, however, that are not currently accounted for by OER research in general and the OTN community in particular. These individuals are arguably just as well-trained in the issues surrounding open textbooks as anyone else who attends OTN workshops, and they too may have reviewed an open textbook. Despite this, they determined that they will not adopt an open textbook and, importantly, some felt compelled to disclose this position via the OTN’s follow up survey. While those who responded to the survey may be a small minority of faculty who have attended OTN workshops, their indicated lack of interest in OER did not stop them from voluntarily following up when prompted.

This specific nonuser population—one that has not otherwise been directly approached in empirical research—is made meaningful for its relationship with the OTN. Broad conceptions of academic culture, priorities, and constraints seem available since

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OTN membership consists of a variety of postsecondary institutions that inevitably recruit a diverse amalgam of faculty to attend workshops. The disciplinary backgrounds, professional standing, curricular goals, and individual aspirations of these educators are likely to vary in significant ways. Yet, the consistency of OTN’s message in teaching faculty about OER-related concepts through open textbooks specifically is a mechanism for uniting a variety of faculty positions under shared awareness of a common form of course materials. As staff who support and administrators who lead OER initiatives at an institution adopt this message and maintain it locally, some baseline of understanding about OER seems assumable among the faculty of OTN member institutions. Given each instructor’s participation in her respective OTN workshops, members of a nonuser subpopulation cannot easily be dismissed as unaware, uninvolved, unengaged faculty members. Beyond retrieving data from a novel source, this study is important for its potential to explore whether there are more complex factors at play than the perceptions, responsibilities, and experiences that faculty are willing to acknowledge when completing surveys about a particular educational technology. For those of us who work in professional development, any resulting theories could improve our methods of engaging a population of faculty who are already aware enough of professional development resources to seek them out, but who we may easily lose track of when they choose not to adopt our goals, tools, and techniques as expected.
Research Question(s) and Revisions

Appropriate research questions for this study might focus on the factors that would lead an instructor to not adopt open textbooks after undergoing the same training as others who did, consider the perceptions of relevance and viability that one might have found while vetting open texts, and (more pointedly) fixate on why instructors who are informed about the affordances of open textbooks do not find them compelling, attractive, or worthwhile. Mindful of these lines of inquiry, and specific to the OTN, I initially sought to answer the following research question: "What motivating values lead an instructor to not adopt open textbooks after attending OTN training, in which they learn about the affordances of openly licensed content and, perhaps, review a discipline-relevant text available in the network’s library?" Early on in data analysis, however, the question broadened in scope as the cause for their choices narrowed. Simply, motivating values dealt less with open textbooks as a technology. Rather, a stronger connection seemed apparent between an instructor’s values and the relationships that she has with their own professional experiences and goals relative to other living and non-living agents. These agents are not just faculty, students, and supervisors, mind you. They may include politicians, family members, and those of us who support faculty for a living. One overarching research question thus splintered into three distinct lines of inquiry:

1. In what ways are the motivating values of faculty considered, recognized, and honored by professional development structures?
2. Which aspects of the OTN experience—attending a workshop, learning about the affordances of openly-licensed content, and perhaps reviewing a relevant textbook—miss/engage these values?

3. What merits exist for faculty who opt not to adopt a readily adoptable educational resource?

The answers to these questions inevitably shift attention away from how certain faculty challenge the efforts of those who are trying to help them and, instead, toward how our efforts to help faculty may challenge their values (and, thus, their motivation) in certain ways. As a result, even a broadly sustainable\(^\text{15}\), scalable, and empowering instructional intervention like OER may prove unappealing when we treat adoption as an outcome for and not a conversation with faculty.

**Methodologies for Studying OTN-Trained Nonusers**

I have utilized research methods based in grounded theory (Glaser & Strauss, 1967; Clarke, 2005) to abductively uncover descriptive theories about the OER-informed population described and the conditions of their non-use of open textbooks. One simple argument in support of grounded theory is that these instructors do not generate the same sort of usage data as the un/aware adopters studied by other OER researchers. Not only is this population difficult to find and engage outside of the OTN-related contexts I have

\(^{15}\) Downes (2007) considers OER "sustainable" in that “The use of a learning resource, through adaptation and repurposing, becomes the production of another resource” (p. 41). As a result of OER's capacity to both communicate and create knowledge, the long-term relevance of this particular technology is sustainable because of its capacity to be (re)used, (re)mixed, revised, retained, and redistributed indefinitely (Wiley, 2016, November 07).
described, but they are also rare for their being consistently well trained on OER concepts. A common curriculum about open textbooks allows us to also presume that the logical (e.g., statistical data about the state of student debt in the United States) and emotional (e.g., video-based accounts of student struggles with college expenses) appeals employed by presenters in the workshop do not function for this population in the same way that they seem to for others (Ernst, 2019). And so, the level of awareness and engagement of OTN-trained non-adopters seems to confound the findings of large, representative surveys of faculty opinion which contextualizes the decision to not use OER within a lack of knowledge or unwillingness to change. Because a grounded theory, as defined by Glaser & Strauss (1967), seeks emergent theories from “purposeful systematic generation from the data of social research” (p.28), the literature guiding my study's design was first contextual—identifying the stakes, activities, and infrastructure that are relevant to training in and adoption of open textbooks—and later theoretical—situating observations within larger, multidisciplinary discussions of educational technology frameworks, formations of educational identity, social negotiation of values, and intrinsic/extrinsic motivation.

Thornberg (2012) recounts that there is some disagreement among those who employ grounded theory regarding the degree to which researchers should review relevant literature before data analysis. Concerns about researcher bias during theory construction are rooted in, specifically, Glaser’s approach to grounded theory in which theories arise inductively from the data alone. Researchers employing this approach postpone the literature review until data analysis is near completion, contending “that
delaying the literature review aids the researcher to generate a theory that fits with and is well-grounded in the empirical world” (Thornberg, 2012, p. 244). Alternatively, others, including Thornberg, have come to recognize the practical role that consulting other research plays in justifying the design and context of a new study. Hussein, Kennedy, and Oliver (2017) recently advocated for a “dynamic, reflexive, and integrative” approach to literature review throughout grounded theory research because “[i]t is the responsibility of the GT researcher to engage with the intention to animate new knowledge from the start of literature review” and “[s]ystematic exploration is beneficial in the auditing and appraising of GT data. (pp. 1206–1207).” Under this latter, Straussian perspective, I consulted literature prior to the study. The scope of this knowledge, however, emphasized the novelty of my study in the greater body of OER efficacy research. After data analysis, themes among the data led me to explore additional literature in an effort to better comprehend how technological innovation, faculty development, and self-constitution shape an educator’s identity and ensuing behavior.

**Significances of this Study**

While I initially suspected that this study would yield valuable understanding about the forces that complicate instructional choices for faculty, my methodological focus on both identity (Gee, 2001) and values (Saldaña, 2009) highlighted how the factors influencing OTN-trained, non-adopters of open textbooks are utterly reasonable in the context of each educator’s educational role(s). What proved more problematic, however, were the institutionalized values and expectations common faculty development
and assessment strategies imposed on these instructors both actively and passively. Simply, there are advantages for faculty who disengage with those who train them.

Naturally, findings from this study may most readily benefit the work of the OTN, its faculty/staff trainers, and others who leverage its educational resources to better inform faculty about OER in general and open textbooks in particular. Yet, the overarching theory of *educative reticence* that emerges in the following chapters begs all of us who work in postsecondary education to (re)consider how we approach faculty about educational interventions. It is also worth examining how institutionalized means of evaluating and recognizing the outcomes of all of our work (administrators, staff, faculty, and students alike) encourage us to reserve the unique experiences, sentiments, and activities that bring us joy in our educative work but potentially threaten our access to teaching and learning opportunities. For this reason, the relevance of this study extends beyond the OTN, open textbooks, and even OER. When we design faculty learning opportunities in service of a specific technology *best practices*, the priorities of non-faculty work schedules, a static portfolio of institutional resources, and so on, we ask faculty to check their affinities in favor of our efficiencies. As such, this population may presumably hold answers to valuable questions like the following:

1. What leads faculty who recognize the value in a tool/practice and could readily adopt it as part of their instruction to choose not to do so?

2. To what degree do my practices in supporting faculty impede their ability to learn a new technology, skill, or craft?
For those of us who support faculty in online instruction, instructional design, technology use, and general teaching excellence, answers to the former may help us better empathize with the scope of an educator’s work, while the latter may (re)affirm the responsibilities inherent to the role of educating educators.

**Researcher’s Role(s) and Positionality**

The nature of my day-to-day work as an administrator in online and technology-enhanced education is seldom apparent to onlookers. This seems especially true for those who are not as immersed in the conversations haunting academic institutions as they are prone to ask me, “what do you teach?” when I tell them I work in higher education. Even though I do teach classes on occasion (I currently teach for Boise State’s First-Year Writing Program), the best response I have come up with for addressing my full-time responsibilities is also, perhaps, the most telling in terms of my orientation toward the work I do as a researcher for this study: I teach teachers how to teach with technology. As someone who has devoted his professional career to promoting educational access for adult learners via data-informed interventions in instructional media, educational technology, and digital pedagogy, I am well acquainted with current topics of faculty training in these areas regardless of discipline. Whether at Clemson or Boise State, my professional support of faculty has been housed in organizationally centralized departments—the former in online education and the latter in information technology. I am thus capable of parsing teaching context across the institution, which would (and did) prove helpful for a qualitative study of faculty values in which participants cite
discipline-specific tools, techniques, and priorities. Yet working and sympathizing with faculty from a range of disciplines is what shepherded me into academe in the first place.

My interest in becoming an educator developed during my undergraduate study at the University of Idaho and Western Washington University. A handful of instructors at both institutions celebrated my inherently interdisciplinary perspectives about communication, philosophy, art, and education. When I started college, I pursued what seemed like straightforward majors in advertising and graphic design. These were, after all, the sort of fields that creative, first-generation students from working-class families were advised to enter if they wanted to make a living in the 21st century. My relationship with faculty mentors, however, is what led me to consider how creative skills in visual design and digital media were increasingly important for engaging learners and inspiring others’ own creative work. Because of the way that college professors invested in me as a colleague by facilitating rich conversations with me outside of the classroom, volunteer opportunities to assist their teaching, and customized learning experiences that would condition me for work in higher education, I find an imperative for doing at least as much for those I teach. This conviction is at the heart of my values as an educator, professional, and advocate in education. It has motivated all of my graduate research and continues to motivate my advocacy of open education—a movement I first became familiar with (in practice, not name) when teaching multimodal composition to community college students.

Immediately after completing my Master’s in Professional Communication in 2011, I assumed a dual appointment as a part-time writing adjunct and writing center
tutor at Central Oregon Community College (COCC). I taught developmental, first-year, and technical writing at a time where Central Oregon’s post-recession economy was still uncertain, and community college enrollment was higher than ever. Many of my students sought college-level credentials as a means of securing more stable careers. I taught a laid-off drywaller who was pursuing a nursing degree, an underemployed housekeeper who was interested in web design, a veteran who needed additional qualifications before applying for computer science programs, and others who pursued new educational opportunities as their professional livelihoods stagnated or disappeared in the region.

As a first-generation college student who followed my parents as they chased employment town-to-town and state-to-state, I still deeply empathize with these learners. They shackled their student status to faith that better professional opportunities would arise, and more predictable futures would take shape for them and their families by way of a college education. As a twenty-something repaying tens of thousands of dollars in student loans, I also shared the concerns of my younger, traditionally college-age students who found themselves unsettled by rising rates of unemployment and debt among college graduates. For either group, learning for learning’s sake was not going to be good enough. They wanted tangible returns from their educational investments. The diversity of my students’ life experiences and practicality of their motivations ultimately inspired me to develop assignments that were as relevant to course learning outcomes as they were helpful to students’ efforts beyond my class.

I have come to learn in conversations with other educators that this particular context—a pedagogical concern for educational access, affordability, and utility—
unwittingly led many of us to OER. In courses where my department required me to use specific textbooks, I would supplement readings with openly-licensed reference materials that students could add to and keep after they returned or resold the commercial texts required for a class. I designed assignments that would ask learners to author rhetorical or technical improvements to the literacy artifacts that populated their daily lives, which in turn empowered learners to produce in-class writing that they would want to share with others. So they did; by introducing these same students to Creative Commons licensing, they took pride in producing websites, brochures, templates, menus, op-eds, blog posts, infographics, and other informational materials that they could use to support their goals and interests outside of class. These openly-licensed artifacts of student work then became both examples and learning objects for students in subsequent courses to consider. Such assignments asked learners to critically investigate how the lessons that they were learning in my class directly related to their chosen professional paths. Additionally, their considerations of copyright and open licensing\textsuperscript{16} found them building, networking, and maintaining discourse-sensitive professional identities online.

My time in Central Oregon proved foundational for me as an educator. I found a detailed understanding of the stakes in modern teaching and learning. In addition to

\textsuperscript{16} When I mention open licensing, I am likely referring to Creative Commons (CC)—a non-profit open licensing organization—that is arguably the most prominent means of defining the use of educational content beyond standard copyright laws. To demonstrate the high level of CC’s influence, the organization reported that 1.4 Billion works have been licensed under Creative Commons (up 86 million over 2015 totals) in its last State of the Commons Report. 65 percent of this open content had been shared under “free culture” (CC0 and other Public Domain licenses, CC BY, and CC BY-SA) licenses, while the other 35 percent (CC BY-NC-ND, CC BY-NC-SA, CC BY-NC, and CC BY-ND) allow authors to reserve some rights for how others to revise, remix, and redistribute materials (Creative Commons, 2017). All of these licenses are considered “open.”
teaching and tutoring, I also worked as a part-time graphic designer, web developer, copy
editor, and barista to pay for rent and utilities. Though this sort of seven-days-a-week,
gig-to-gig work-life balance may have been (and still is) common for adjuncts, it was
hardly sustainable if I wanted to be my best as an educator. While many students
followed me through classes in sequence, my contract only allowed me to teach so often.
Competition from more senior adjuncts, full-time lecturers, or tenure-track/tenured
instructors further limited my teaching schedule. It became apparent that despite my
student-centered ambitions as an educator, my lack of professional experience and
credentials was keeping me from producing the change I wanted to see for learners and
other adjuncts. As a result, I took an administrative position at Clemson and began my
doctoral studies in 2013.

As a researcher, my positionality spans multiple disciplines, institutions, and
workplaces—both academic and non-academic. While drawing my positions on
education research from personal and professional convictions is not uncommon, it is the
diversity of my experiences as a teacher and student that proved most necessary in
helping me build relationships and empathize with the faculty I interviewed. As will
become apparent in the following chapters, an empathy-first approach to engaging faculty
may yield important insights for those of us who support teaching and learning for a
living. By leading with empathy, we recognize that the optimal path to learning is seldom
the one traveled. This has been the case for me, as evidenced by this statement and the
pre-interview survey that I also completed for myself and annotated below (Table 1.2).
My survey responses in the table help orient me as a more knowledgeable other in some
matters and the faculty I interviewed as more knowledgeable in other areas. I include this table here instead of in an appendix so that my values can be more readily reviewed before we investigate the levers that motivate faculty work with and positionality toward instructional change in the following chapter.

Table 1.2. Researcher’s annotated pre-interview survey responses

<table>
<thead>
<tr>
<th>Age</th>
<th>Under 35</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>Only one of my respondents was in this age group.</td>
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</table>

<table>
<thead>
<tr>
<th>Gender</th>
<th>Male</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>This is significant because research has shown how teaching experiences vary greatly based on gender (MacNell, Driscoll, &amp; Hunt, 2015; Theall &amp; Franklin, 2001).</td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Ethnicity</th>
<th>White</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All but one survey participants identified as white.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Institution type</th>
<th>Four-year institution, Research</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All participants worked for four-year institutions.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Teaching Status</th>
<th>Part-time</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All study participants were full-time faculty whereas I am a full-time administrator.</td>
</tr>
</tbody>
</table>

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<thead>
<tr>
<th>Tenure Status</th>
<th>Not tenure track</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I had this in common with four other participants.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Years Teaching</th>
<th>6–9 years</th>
</tr>
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<tbody>
<tr>
<td></td>
<td>I had this in common with four other participants. That said, while I was not always the instructor of record, I have been teaching at the post-secondary level for just over 10 years. Early experiences in guest lecturing and as a volunteer teaching assistant scaffolded both technique and expectations for me as</td>
</tr>
</tbody>
</table>
an educator. This education was afforded to me by faculty mentors while I pursued my Bachelors in Literature at Western Washington University. As I have come to learn as an administrator in areas that support faculty and student development, this sort of exposure to pedagogical practice is rare in most graduate programs, let alone undergraduate learning experiences.

<table>
<thead>
<tr>
<th>Modalities taught (in the last year)</th>
<th>Face-to-face course, Blended/Hybrid</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Though both are influenced by online learning strategies thanks to my experience as an administrator in online (Clemson) and technology-enhanced (Clemson and Boise State) education.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Disciplinary home for teaching</th>
<th>Arts and Humanities, Education, Languages/Linguistics, Philosophy, Psychology, Social Sciences</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>My student career has spanned multiple disciplines and colleges at three universities.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Role in selecting course texts</th>
<th>I am solely responsible for the selection</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Though this was not the case last academic year when I was new to the department and expected to assign the standardized textbook(s).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Types of texts required or recommended</th>
<th>Articles/Case studies (Required), Multimedia (Required)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>I teach multimodal reading and writing at the college level, so many “readings” are based in media and a variety of popular written genres (e.g., news articles, blog posts, reports, etc.).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>License associated with these texts</th>
<th>Articles/Case studies (Copyrighted, Creative Commons), Multimedia (Public Domain, Creative Commons)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>My current class exclusively assigns OER compiled by me. In the event that I want to use copyrighted articles in class, I have leveraged library access to materials (Lashley, Cummings-Sauls, Bennett, and Lindshield, 2017).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Important factors for texts</th>
<th>Extremely Important: Easy to find, Easy to use/ navigate, Cost to student, Available in digital format, Adaptable/Editable content</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>These factors ensure the broadest access for learners as well as creative agency, accountability, and</td>
</tr>
</tbody>
</table>
ownership: the roles I expect students to assume in my classes. Further, I turned down a teaching appointment with Ashford because I could not take full responsibility for the learning experiences of my students.

**Moderately Important: Available in print format, Comprehensive content and activities, Familiarity with the brand/publisher, Works with LMS, Recommended by other faculty members**

If students want a printed version, I want them to have the option. I am accustomed to filling in content gaps, even when a text is foundational or has the full weight of publishers and peer-review behind it. Whatever I have determined a publisher’s ethos to be as a partner in online and technology-enhanced learning, so my opinion of their efforts is shaped. Poor regards for a publisher/brand will even negatively affect my consideration of authors I respect otherwise. As an LMS administrator, my general comprehension of integrating course content is presumably more complex than the faculty I interviewed. Simply, if I can’t make the content work well in an LMS, I will enact other strategies for delivering content. I do consider the recommendations of other faculty members, and doing so is what led me to Parlor Press’ *Writing Spaces* for many of my current assigned readings. That said, I am also used to working in a vacuum and expecting that no other instructors teach courses quite the same way that I do.

**Not Important at all: Includes supplemental materials, Includes test banks**

The use and standardization of these resources is most directly set by proprietary software that publishers have developed to align ancillary materials with their textbooks, promote an “active learning” experience for students, and lessen the burden of student assessment and course design for instructors. I have no use for them in my courses, but they continue to be a stumbling block for “widespread
<table>
<thead>
<tr>
<th>Current satisfaction with texts</th>
<th>adoption of high-quality open textbooks” (Jhangiani, 2017, p. 143)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Somewhat satisfied</td>
<td>I will likely use many of my assigned texts again, but I will continue to adapt reading lists to better honor student cohorts and scaffold student understanding around the learning experiences I design in relation to departmental learning outcomes.</td>
</tr>
<tr>
<td>Familiarity with licensing mechanisms</td>
<td>Very familiar: Copyright, Public Domain, Creative Commons</td>
</tr>
<tr>
<td></td>
<td>I recognize that I am more practiced in my understanding than most, but I (like others in the open education community) continue to learn much about these licensing mechanisms.</td>
</tr>
<tr>
<td>Value of CC-permitted activities</td>
<td>Extremely valuable: Copying, Sharing, Using, Keeping, Mixing, Editing</td>
</tr>
<tr>
<td></td>
<td>I came to OER through my appreciation of CC licenses and the implications they had for democratizing—making openly available—the creative work of others' knowledge. I feel the broad dissemination of affirmed knowledge should be the goal of public education.</td>
</tr>
<tr>
<td>Familiarity with the concept of OER</td>
<td>Extremely familiar</td>
</tr>
<tr>
<td></td>
<td>As much as I have resisted specialization in my academic work, this topic is the closest that I have gotten outside of more nebulous associations with specific domains like &quot;Composition and Rhetoric&quot; or &quot;Learning Sciences.&quot;</td>
</tr>
<tr>
<td>Experience using OER</td>
<td>Assigned as required course materials; created OER on my own and with students</td>
</tr>
<tr>
<td></td>
<td>Asking students to both consume and produce knowledge (Freire, 2000) is not an uncommon task in project-based learning environments like those found in college writing courses. I have been teaching renewable assignments of lasting values since I first started teaching my own classes. See Wiley (2016, July 07) for more on what makes an assessment “renewable” instead of merely “disposable.”</td>
</tr>
<tr>
<td>Familiarity with open textbooks</td>
<td>Extremely familiar</td>
</tr>
<tr>
<td>---------------------------------</td>
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</tr>
<tr>
<td></td>
<td>I have conducted OTN workshops for faculty and staff as well as student and academic leaders for nearly two years. I have also researched and written on the efficacy of open textbooks as a form of OER (Lashley, Wesolek, and Langley, 2018; Lashley, Cummings-Sauls, Bennett, and Lindshield, 2017).</td>
</tr>
<tr>
<td>Reviewed open textbook for OTN: No</td>
<td>Motivation to not review: Other - I have yet to be in the position where I attend a workshop as a faculty member</td>
</tr>
<tr>
<td></td>
<td>Even if I were to do so at Boise State (a workshop was conducted in November 2018), I would only feel comfortable completing a review if my stipend were withheld so as to incentivize the work of another faculty member.</td>
</tr>
<tr>
<td>Important deterents for using open textbooks</td>
<td>I do not use textbooks in my courses</td>
</tr>
<tr>
<td></td>
<td>I have little love for the textbook genre. I prefer to unbundle content strategically across modules in an LMS or in the pages of a website. When I have used textbooks in the past, I would supplement readings with openly licensed materials, library-owned articles, or multimedia available publicly and through fair-use.</td>
</tr>
<tr>
<td>Factor that could lead to adopting open textbooks</td>
<td>I start using textbooks in my courses</td>
</tr>
<tr>
<td></td>
<td>It is unlikely, however, that I will consider using a book that adheres to current conventions of the textbook genre. For my own versioning and research management needs, I am currently exploring Pressbooks as a means of compiling readings in a central, consistent eBook experience for learners.</td>
</tr>
<tr>
<td>Likelihood of using OER in the future</td>
<td>Definitely yes, because I cannot imagine teaching the sort of class that I teach without OER</td>
</tr>
<tr>
<td></td>
<td>Though it may not be for everyone due to technical or pedagogical blind spots, consuming and producing OER is a staple activity in the courses that I teach.</td>
</tr>
</tbody>
</table>
Organization of the Dissertation

The five chapters of this manuscript align with the organization of other empirical research reports: Introduction, Literature Review, Methods, Findings, Discussion. Brief, introductory summaries for each of the following chapters conclude this, the first chapter and introduction of the dissertation.

Chapter Two.

In the second chapter, I will discuss the internal and external mechanisms that lead faculty members to engage in “educative tasks” (Dewey, 1913) such as attending a workshop on open textbooks, reviewing a textbook, and situating themselves as academics. Consulting pertinent literature, I recount the stakes and stakeholders informing any instructional change in higher education and outline the ways in which language, institutions, affinities, and experiences condition how faculty navigate their work as educators. By doing so, we may discern some of the ways in which various intrinsic and extrinsic motivators are necessary for securing faculty interest in and encouraging them to expend effort toward professional development opportunities like those presented by the OTN.

Chapter Three.

The research methods and design that I used to isolate the motivating values of faculty are described in the third chapter. The methods that were used suggest that one’s
values, attitudes, and beliefs are as integral to defining her *educative ethos*\(^{17}\) as the sense of self that she harbors reflexively, that others confirm socially, and that predicate instructive action. The design of the study anticipated that such qualities could be discerned through semi-structured interviews with members of the disclosed nonuser population (N=76)—faculty who attended OTN training, possibly reviewed a book featured in the OTL and indicated in a follow-up survey that they did not intend to use open textbooks. The design rationale for pre-interview surveys and semi-structured interviews are presented, data collection and management strategies are articulated, and delimitations of this study are discussed.

**Chapter Four.**

The findings that I put forward in the fourth chapter serve as an exemplar for *values coding* (Saldaña, 2009), *situational analysis* (Clarke, 2005), and *identity as an analytical lens* (Gee, 2001), wherein an empirical understanding of educative ethos emerges among the motivating values of those who participated in this study. The first half of the chapter articulates the recurring themes of faculty activities via interviewee statements of value. Situational analysis, and the multiple mapping procedures that accompany this modified grounded theory approach, organize the rest of the chapter with investigations of instructional change, faculty positionality, and the social worlds/arenas of faculty using technology. The outcomes of this study confirm the importance of

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\(^{17}\) By educative ethos, I am referring the ways in which an instructor’s ethos is shaped by her educational practice. A more general conception of ethos may not overtly account for her educative activity, thus the modified terminology used in the study of faculty as they pursue their own motivating values in instruction, scholarship, service, and the other academic commitments.
considering both values and positionality when studying the actions of an educator and sets a foundation for the overarching theory of *educative reticence* that emerged from survey and interview data.

**Chapter Five.**

I identify and discuss educative reticence as a force that mediates the interests and efforts of faculty in the fifth and final chapter. Not only are the conditions of reticence present in the acts of nonuser faculty like those I studied, I suggest that its influence may be found in the liminal disclosures of self that occupy the utterances and activities of anyone whose work influences teaching and learning. By considering the presence of reticence in the educative activities undertaken by faculty, those of us who support faculty may find new means of sponsoring a culture of curiosity in which educative advention is prized and the appeal of reticence to an educator may be assuaged by institutional support structures that empathize with a person’s predisposition to explore and share interests across boundaries. If such a culture sounds familiar, it is because many of us advocate for personal, playful activities in student learning environments so as to encourage safe boundary crossing. The alternative is a well-tread landscape in which educational innovation promotes the technological expediency of teaching/learning over more inventive, creative, and exploratory acts of academic inquiry. The manuscript concludes by revisiting the research questions defined in Chapter One and explores what future research and practice may look like in trying to reconcile those forces that restrain an instructor’s full disclosure of her educative values.
CHAPTER TWO
LEVERS OF FACULTY ENGAGEMENT

(1) Everyone has duties to the community in which alone the free and full development of his personality is possible.

(“Universal declaration of human rights,” 1948, Article 29)

An educator’s work may be as rewarding as it is stressful. In a 2016 report, researchers from Pennsylvania State University found that 46 percent of teachers encountered “high daily stress,” which is not only the highest rate reported among occupations but suggests that the stress shouldered by teachers on a daily basis is most comparable to that of nurses—the only other profession to share this percentage (Greenberg, Brown, & Abenavoli, 2016, p. 5). Among such working conditions, health deterioration, poor student/teacher performance, and employee turnover are just a few of the outcomes that Greenberg, Brown, and Abenavoli caution (p. 5). For higher education, in particular, the roles of a faculty member extend beyond teaching students in a classroom. Ziker (2014) found that attending meetings, sending emails, preparing for class, teaching classes, and administrating courses were, respectively, the top five investments of faculty time across their 61-hour average work week (pp. 4–6). While teaching, research, and service may characterize the standard “three missions” of academe, Hyman et al. (2001–2002) suggest that expectations for academe are higher than ever due to global pressures, advances in information technology, and the need for a highly skilled workforce (p. 41). If instructors have not had any formal teaching experience prior to their first faculty appointment (Boyer, 1990), let alone training in how
to modify instruction to respect culturally diverse adult learners (Biggs, 1999), the nature of much faculty work may, at best, consist of efforts to either make do with practices that seem to work for others (e.g., former instructors, current colleagues, their students, etc.) or invest time and effort into professional development opportunities as they come available (Day, Elliot, & Kington, 2005). Neither approach is likely to minimize the stress that accompanies the work of an educator.

Recognizing an increasing public demand for lifelong learning opportunities, Hyman et al. (2001–2002) encourage faculty to develop creative, flexible solutions for education. They concede, however, that such efforts would take place across a system for recognizing and rewarding faculty “that shows preference for rewarding basic research and resident teaching over other forms of scholarship” (p. 42). These observations build off of the work of Boyer (1990) who argues, “The rich diversity and potential of American higher education cannot be fully realized if campus missions are too narrowly defined or if the faculty reward system is inappropriately restricted” (p. xxi). Such a system, Boyer determines, situates scholarly identities within teaching-versus-research debate and leads faculty to express “serious reservations about the enterprise to which they have committed their professional lives” (p. 75). Rather than enforce the narrow definitions of teaching, research, and service that constitute the three missions of higher education, Boyer’s model promotes four key functions of scholarship that should be considered by institutional reward systems: (1) the discovery of knowledge, (2) the integration of knowledge, (3) the application of knowledge, and (4) teaching. Such considerations, Boyer argues, raises the notion that effective teaching is found when
“faculty, as scholars, are also learners” (p. 24), and “may prove especially useful to faculty as they reflect on the meaning and direction of their professional lives” (p. 25). While observance of scholarship in these forms may more comprehensively account for the value of an instructor’s work, it is still necessary that faculty show up, present their scholarly activity for others’ consideration, and make peace with the vulnerability that comes from positioning oneself as an expert who is perpetually learning.

Coming from the disciplines of composition studies and education, where graduate students learn about pedagogy and instructional theory while often designing and delivering instruction to college-aged students, I tend to take for granted how abstractly discouraging the prospect of instructional change can be for those who have not had the same opportunities. If an institution insufficiently recognizes or rewards faculty who pursue training opportunities, a lack of motivation to attend seems warranted (Lowenthal, Wray, Bates, Switzer, & Stevens, 2013). A general sense of unease also seems reasonable for faculty members who want to effectively transition to online and technology-enhanced teaching (Baran and Correia, 2014). Thus, great care must be taken in the design and delivery of faculty development since faculty members’ workloads may vary wildly, administrative and non-academic tasks compete with the three missions of higher education, faculty do not prioritize those missions equally (Chen, 2015), and professional development is likely an optional endeavor. The following chapter thus regards faculty motivation as a prominent foil to professional development success: if optional training is not more important than other professional obligations, it seems unlikely that those of us who train faculty will effectively maintain the interest and/or
attract the requisite effort necessary to reach specific learning outcomes. This problem is one that the OTN has sought to address.

**OTN-Sponsored Faculty Development**

The curriculum delivered during OTN workshops is, in fact, an OER that receives continued iteration by those who present on behalf of the network. Prior to attending the OTN workshop, an institution's membership coordinator may ask faculty to search the OTL and identify a book that is relevant to the courses that they teach or, more broadly, their area of study (Cohen, 2018). Even if this is done post-workshop, the request is not without its impositions: we are not just asking faculty to find a book, we are asking them to synthesize what they know about their course, its learning outcomes, as well as the expectations of their students and colleagues. Considering how these faculty members may go on to review an open textbook for the OTL and that their review will be published as an OER on the text’s associated web page, the stakes of their perspective as reviewers increases; they are accountable to their field at large when each textbook review is posted under the name of the faculty reviewer and features both an aggregate star rating as well as descriptive feedback about the textbook's comprehensiveness, accuracy, relevance/longevity, clarity, consistency, modularity, organization/structure/flow, interface, grammar errors, cultural relevance, and anything else that seems worth noting by these subject matter experts (Cohen, 2019). Alluded to earlier in referring to each review as an OER, a faculty member’s disciplinary assessment of a book is published under an open Creative Commons license (CC BY), which retains
the intellectual property rights of the reviewer while also making her review’s content openly available for use by others. Under these measures, peer review of OTL textbooks is both solicited and documented publicly. That said, so is the discursive identity of the reviewer.

While the OTN cannot account for professional insecurities or gaps in disciplinary knowledge of faculty reviewers, they can (and do) ensure a baseline understanding of what to look for when reviewing an open textbook. Coupled with the assurance that the OTL only features textbooks that are actively in use by faculty at multiple institutions or, alternatively, were produced by large-scale publishing outfits in which quality assurance is part of the production process, the OTN holds a unique advantage in being able to advertise some degree of assessed “quality” for the materials that they curate (open.umn.edu/opentextbooks). Even if only found during their time as students using assigned course materials, faculty likely have the experience necessary to compare open textbooks to their commercial counterparts. Thus, the content of the OTN workshop focuses far more on the potential affordances of an open textbook for teaching and learning than the technological role of a textbook itself. Given the ways in which an open textbook may also be modified to fit the local contexts of a specific instructor, course, or group of students, perhaps the predictable function of a textbook is less important than the potential of its forms and applications under open licensing. Where the textbook emerged as a technology for “preserving knowledge, word-for-word, from its original, sacred, or ancient source,” it has increasingly come to reflect “changing demands—from the romantic call to self-expression to today’s demands for optimal
cognitive processing” (Friesen, 2017, Loc. 333). Under this evolving standard, a textbook is little more than what we recognize it to be in specific educational contexts. In the case of open textbooks, we thus are able to trade strict observance of those qualities that constitute a specific media genre and, instead, envision the potentialities of form and function that could exist for openly licensed educational content. And so, the potential of open textbooks has become an increasingly prominent part of the OTN workshop via novel references to OER-enabled pedagogy and the capacity of openly accessible course materials to offset social justice issues like student hunger and homelessness.

Foremost, the OTN slide deck maintained by Ernst (2019) positions OER—specifically, open textbooks—as a vehicle for addressing the increasingly unwieldy rise in college-related debt. A series of early slides visually document that while the number of Americans enrolling in college has generally increased, funding for public higher education has waned, tuition prices have risen (State Higher Education Executive Officers, 2017), and students have turned to loans for financial assistance (Paulsen & St. John, 2002). By recounting how the cost of college tuition/fees and housing (excluding board) rose by 63 percent and 51 percent respectively between 2006 and 2016, and how the average college debt currently held by individuals falls between $4,600 (low) to $59,100 (high) depending on their geographic location (The Institute for College Access & Success, 2017), the OTN slide deck paints a stark picture of the cost of obtaining a postsecondary education today. Coupling college debt with the reality that the cost of textbooks—a mainstay of required course materials—rose 88 percent from 2006 to 2016 (Bureau of Labor and Statistics, 2016) and over three times the rate of inflation since
1977 (Popken, 2015), a strong emotional appeal emerges around the topic of textbook choice—something that all workshop attendees can either influence or directly change. Beyond cost, rising textbook prices are also a student success issue as students delay or even dismiss purchasing required texts and, as a result, bear the consequences of not being able to fully access the required content of a course (Florida Virtual Campus, 2016). Since earning poor grades, dropping or failing courses, taking fewer credit hours, delaying registration for a class, or dropping out of college altogether are all scenarios that might impede a student’s progress and exacerbate her personal debt, the OTN strategy seems a persuasive one. After all, what sort of faculty member would take pleasure in knowing that their textbook choice might sponsor student attrition along such lines? Such a situation seems significantly severe when we consider that the students who drop out are often concluding their college experience with nothing to show for their time and effort but debt. Since those who drop out are more likely to be unemployed, hold lower salaries, and ultimately default on student loans (Chetty, Friedman, Saez, Turner, & Yagan, 2017; Nguyen, 2017), the importance of assuring student access to educational content becomes apparent not just for their success in college but in life. Publishers can offer affordable options, but only OER can provide free access to education-oriented content forever.

As conversations about student savings and access converge with the capacity of learners and instructors alike to customize openly-licensed content around a particular learning outcomes, populations, or environments, the value of OER begins to shift beyond the need to lower the costs of learning alone. A growing part of the OTN
workshop showcases examples where pedagogical value emerges when instructors and students produce more relevant educational materials by way of Creative Commons licensing (creativecommons.org). For example, when individuals modify an open textbook to include relevant examples (e.g., webliteracy.pressbooks.com), instructor-made videos (Math 1151, 2014), and lessons that are novel for a particular learning context (e.g., pm4id.org), the possibilities of pedagogical innovations may seem limitless for attendees who have otherwise felt stymied by the inflexible copyrights of commercial textbooks. Wiley (n.d.) notes that by using open content, all users gain free access to pertinent knowledge, retain copies of this information forever, share it with whomever they please, and (in many cases) modify educational content in ways that promote ongoing relevance. Rather than bend lessons and assignments around the content of a commercial textbook, faculty and students may manipulate openly licensed educational content to better honor a curriculum and fashion learning experiences that are worthier of a learner's time and engagement. As Coughlan, Pitt, and McAndrew (2013) remind us, however, “Different kinds of practices around OER appear necessary to address the needs of learners at earlier stages in their development” (p. 3), and so some of these customizations may even mean editing OER to be more technically accessible. As Coleman-Prisco (2017) found, such practices in reinvention and remixing are most likely to happen at the “implementation stage” if at all (p. 9). Though faculty may consider student affordability, learning, and success to be more important, “the ability to customize, remix, and share OER considerably contributes to faculty adoption or non-adoption of OER” (Coleman-Prisco, 2017, p. 9). As a professional development
experience, the OTN lowers the barriers of implementation and asks attendees to critically evaluate open versions of a technology with which they are already familiar, might easily reimagine, and probably should (re)consider on behalf of students. Further, in two hours, the OTN faculty workshop systematically covers common arguments that support OER and pose answers to what seems like an inherently logical question: if the academic community is capable of creating, sharing, and modifying free educational content openly, why wouldn’t we?

**Interest and Effort in (O)ER**

For a technology like OER, with its innovative dependence on open licenses to promote transformative use of content, the possibilities may seem as readily inspiring as they are abstractly limitless for faculty in the context of their own instruction. As the open education community winnows its definitions, educational technology community develops frameworks to scaffold use, and institutions invest in OER support structures, there remain faculty who will choose not to adopt OER. As such, the open education community may most naturally direct its attention to messaging when concerns about faculty awareness or incomplete understanding arise as they do in the findings of prominent surveys about faculty regard for OER. For instance, low faculty awareness about the existence of OER and confusion about what the concept means remain evergreen problems for advocates of open education to address (Seaman & Seaman, 2017). When instructors are aware of OER, the conditions of their awareness tend to vary in meaningful ways. Concerns about a lack of “resources for my subject,” the difficulty
of finding “what I need if it is out there, the “long-term viability” of open content, and about “who will keep content current” all denote, for instance, an understanding of OER that is mediated by the commercial textbook industry (Seaman & Seaman, 2017, p. 2). Thus, the attractiveness of these commercial expectations should not be discounted. In their most recent annual letter, Gates and Gates (2019) recognized the prominence of active learning platforms in the boldly titled section, “Textbooks are becoming obsolete.” Couching this declaration in one author’s experience of “having read more than my share of textbooks” and that textbooks are “a pretty limited way to learn something,” these thought leaders in technology recognize potential in adaptive learning platforms that figure out “which concepts you understand and which ones you need more help with” and further “tell your teacher how well you grasped last night’s assigned reading” (paras. 82–88). Inherent to Gates’ shared perspective, however, is a “banking concept of education” (Freire, 2000) that positions learning as transaction and seeks evidence of effective teaching in the speed by which transactions terminate. While this is not to say that such digital learning environments are not persuasive technology for many students in instigating the completion of particular tasks toward specific outcomes, nor is it a bad thing that such software produce analytic insights about how a student navigates learning content, the enthusiasm that the Gates put forward is one that is seldom matched by those of us who see learning as something that is deeply personal and therefore complex.

Without an informed understanding of not just the perceptions of faculty and students as they navigate teaching and learning but also the origin and fixity of those perceptions, we cannot hope to understand the levers that might influence a person to act
in educative ways—purposefully adjusting instructional practice for consideration by others (Hammersley, 2003; McLaughlin, 2005). Dewey (1913) took up this very issue in his manuscript, *Interest and Effort in Education*, and it is perhaps humbling that his musings on how interests and effort are necessary components of ones completing educative tasks still ring appropriate to modern teaching and learning contexts. Dewey positions educative (as compared to educational) tasks as those that “supply an indispensable stimulus to thinking, to reflective inquiry” (p. 55). Whereas a textbook, a lecture, and a broken arm, may all prove educational in that they put forward a locus of learning specific lessons, educative tasks are those deliberate practices that, because they are intentional, invite further consideration. To elaborate on this definition, Dewey draws an example from the mere undertaking of all people—children and adults alike—to overcome difficulties when they stand between them and their continued development. Such a human enterprise may also influence the development of onlookers via the example embodied by an individual’s efforts. Not all practices, however, are educative. If, for instance, a person pursues uninteresting, unappealing, or “wholly alien and hence uncongenial” tasks, such efforts would prove uneducative: “they fail to introduce a clearer consciousness of ends and a search for proper means of realization” (pp. 54–55). Additionally, such tasks could be considered miseducative “because they deaden and stupefy; they lead to that confused and dulled state of mind that always attends an action carried on without a realizing sense of what it is all about” (p. 55). In other words, the former is uneducative in its vague display of decision making and the latter is
miseducative in its lack of intellectual investment. These are issues of effort and interest, respectively.

For OER, open textbooks, or any instructional technology, some degree of effort and interest need to exist for willful use (i.e., educative tasks) to take place. Dewey suggests that not all interests are educationally legitimate, though:

Interest is normal and reliance upon it educationally legitimate in the degree in which the activity in question involves growth or development. Interest is illegitimately used in the degree in which it is either a symptom or cause of arrested development in an activity. (p. 41)

Where the educational property of the former is legitimized in the relationship of learning with progress, the latter proves illegitimate for its sponsoring uncritical, reactionary, or restrained behavior. Relevant to the cause of open textbooks is the way in which its novelty positions it as something to be learned and thus able to provoke legitimate interest. The same may be true for faculty considering the new editions and digital environments of commercial textbooks, but interest in a particular set of course materials out of convenience, concern, or reluctance to change would be educationally illegitimate. And change or decision would be in service to prior experience and not the construction of new knowledge. Accordingly, Dewey finds educative effort is perceptible in “the transformation of a comparatively blind activity (whether impulsive or habitual) into a more consciously reflective one” (p. 58). A perspective that leads a faculty member to ignore new instructional techniques or materials in favor of what they have always used is inherently anti-educational.
The challenge, then, for those who design faculty development, is to create opportunities in which faculty participation is driven by “such positive and abiding interest as to arouse the person to clearer recognition of purpose and to a more thoughtful consideration of means of accomplishment” (p. 59). In other words, the interest and effort exhibited by faculty when completing educative tasks as part of professional development must produce some sense of importance that can accompany the activity from beginning to end. For the OTN, such importance may operate among individual tasks like attending a workshop for more information, reviewing a textbook for a stipend, or adopting an open textbook because it appears to be comparable to the commercial text already in use. Each activity is important because it has a perceivable consequences.

The Importance of Motivation

One’s perception of importance, as described, proves a productive sponsor of meaningful activity. Sharing an etymology with both the verb and noun “import,” something that is important bears value that may transfer across boundaries. Further, one’s motivation to perform tasks (educative or otherwise) emerges in the ability of a person to associate an important activity with pleasurable, obtainable outcomes (Wigfield & Eccles, 2000). The notion that a person is more inclined to pursue pleasurable endeavors is not a farfetched one, and the concept’s cross-cultural relevance spans both professional (Pearson & Hui, 2001) and educational contexts (Garson, Bourassa, & Odgers, 2016). Along these lines, a traditional expectancy-value theory that merely considers one’s expectation of achieving success and her perceptions of value for
associated tasks puts forward a haphazardly causal relationship between an educator’s motivating interests and the adoption of, say, an open textbook: if the task merely replaces their commercial textbook with an open one, why would she expend new effort if her interests only align with the content? After all, faculty can, and commonly do, bring their own content (articles, stories, experiences, videos, data, etc.) into a learning experience to supplement commercial texts. What is arguably missing when considering achievement-focused motivation theories alongside OER adoption is that ultimate achievement is recognized independent of the values that a faculty member holds (if recognized at all). It is one thing for an instructor to adopt an open textbook because it reflects her values, it is something else to adopt certain course materials because of outside pressures and expectations. While we often assume that faculty value the prospect of saving students money on textbooks, there are other scholarly activities that arguably garner greater rewards. Though the intention to save students money may be a righteous one, how sustainable can one’s motivations actually be without outside validation of one’s achievements?

In discussions of motivation theory, many scholars have looked to Vroom (1964) for a viable alternative to expectancy-value theories of motivation. Vroom’s theory emphasizes goal setting over achievement and process over outcome. Rather than situate analysis solely in the expectations and values of an individual, VIE theory promotes motivation as a byproduct of three elements being present within an individual’s behavior: Valence, Instrumentality, and Expectancy. Valence may be considered the attractiveness one recognizes in a task as well as the value of the goals that one associates
with the activity (p. 17). In relation to adopting open textbooks, valence may be found in the practices that philosophically privilege open education as well as open practices themselves. *Expectancy* in VIE theory not only considers a probability of successful action but also inventories the resources, knowledge, and skills that are crucial for successfully completing an act. Since success in publishing, sharing, and retaining OER is assured by its licensing mechanisms, a faculty member’s reflection on the tools and technologies available to her is necessary for determining potential barriers of practice. Finally, and perhaps most necessary for assessing an individual’s motivation as it relates to OER is a consideration of *instrumentality*—the assurance that action will lead to desired outcomes. In order for motivation to occur, the instrumentality of meaningful action via OER must be tied to ongoing and significant rewards that extend well beyond the context of one’s ephemeral efforts at a particular time. Arguably, the OTN curriculum successfully honors the tenants of VIE: promoting the social, technical, and pedagogical value of open textbooks, scaffolding successful access to and review of open textbooks via resources like the OTL, and compensating faculty for completing the activity. Significantly, the observable interplay of valence, instrumentality, and expectancy that initiates an act is the notion that one’s sense of motivation, just like her identity, will undoubtedly find mediation from personal, social, and textual influences.

**The Persuasive Power of Recognition**

In terms of Instrumentality, the motivational relationship between behavior and goals seems securely wedded to an individual’s sense of identity. Making use of Gee’s
(2001) definition of identity as the “kind of person one is recognized as being,” one’s identity becomes something to be noticed and reconciled by both the individual and by onlookers (p. 100). Because the personal being of an individual may vary significantly from what others observe by way of a person’s words and actions, any equilibrium between one’s goals and their behavior would seem to be in a state of constant conflict with outside forces. Foucault’s later work on governmentality and power suggested, however, that it is the cultural and textual forces governing one’s pursuit of goals that also make a person’s work relatable—uniting individuals, experiences, and narratives under shared conditions and expectations (Fejes & Dahlstedt, 2014). When Expectancy may be considered relational, the depth and breadth of one’s connections to others seem worth tracking. In an era where relationships are digitally augmented and cultivated by living and non-living agents alike, situating one’s values within a connectivist network where “[c]omputer networks, power grids, and social networks all function on the simple principle that people, groups, systems, nodes, entities can be connected to create an integrated whole” (Siemens, 2005), valence thus seems immediately isolatable and inevitably negotiable when meaningful changes can be documented within both macro and micro level activity of agents across a network. Alternatively, knowledge, experience, and identity, once distributed across transcultural, multinational, and multimodal networks as digital content, undoubtedly exist in a fashion that is just as reflective of the original author’s expectations and values as they are not. In brief, our behavior, like the values that undergird them, are in constant negotiation.
Despite mediation by both internal and external factors, none of the realities I describe above—distributed identity, relational governing, or connected knowledge—are likely to inhibit the motivations of faculty pursuing OER-based practices. Yet, it seems both improbable and irresponsible to expect faculty to at most create and/or customize educational materials and at least adopt pre-made OER when they do not have the time, support, tools, or rewards that are necessary to do so. When staring down definitions of “openness” as they currently exist, it is no wonder that some faculty feel overwhelmed.

Defining Openness Through One’s Tasks

Though the form of OER—no-cost courses, textbooks, videos, lessons, quizzes, etc. that clearly identify (re)use under open licenses—seems easy to recognize in relation to other educational resources, there is some ongoing debate about how best to explain the openness of OER. Where many people associate the meaning of “open” with the permissions granted by open licenses like those administered by the Creative Commons, others question the necessity of licensing when they might publish content without a license (Groom, 2017; Luke, 2017). As Groom states,

I am not interested in the strict rules that define open; open is not the ends [sic], it is one means amongst many . . . [T]o me there is an attempt to define it in order to start controlling it, and that is often related to resources, grants, etc. (para. 3)

In the comments section of Groom’s blog post, one commenter further reasons that “If I want to share what’s inside my head with others, that’s my business” and implores others to simply “Make art. Damnit.” While creators may, of course, forfeit their intellectual
property rights to the creative work that they distribute for others’ use, *learning objects* taught us that there are limits to what one will do if not informed about or comfortable with her capacity to modify content. For many educators, uncertainty about copyright may, at best, be relieved by vaguely-defined claims of fair-use and, at worst, encourage inaccurate defenses based on the concept of *academic freedom*.

The 1940 Statement of Principles on Academic Freedom and Tenure (American Association of University Professors, n.d.), outlines academic freedom in three parts:

1. Faculty are free to conduct and publish research as long as it does not negatively impact their other academic duties and any monetary compensation is ethically consistent with the standards of their institutions.

2. Unless otherwise noted in writing at the time of their appointment with an institution, instructors have complete autonomy over the subject matter discussed in their courses as long as it is on topic.

3. As citizens, academics, and university representatives, those who teach are bound to be judged by their utterances and should "make every effort" to emphasize how they do not speak for broader institutions when they freely speak for themselves. (paras. 8–10)

These “freedoms,” as described, seem to be consistent with those of any other employee who is allowed to pursue creative work as long as it doesn't impede her other duties, hold complete autonomy over how she completes tasks as long as it aligns with the scope of her defined role, and may face discipline if how she exercises free speech negatively reflect on the institution employing her. Inherent to these defining traits of academic
freedom is the expectation that educators would behave in socially responsible ways. Arguably, those who retain, use, and share copyrighted content under the pretense of exercising academic freedom are not modeling socially responsible behavior nor is this behavior endorsed by the stipulations outlined above.

A more appropriate defense, the legal doctrine of "Fair Use," identifies contexts in which copyrighted work may be reproduced and used without legal penalty. Depending on the "purpose and character of the use," "nature of the copyrighted work," "amount and substantiality of the portion used," and the "effect of the use upon the potential market for or value of the copyrighted work" (Copyright Act of 1976, 2012). Though there are explicit references to education in the application of fair use, the degree to which educational use is fair is ill-defined. Because courts evaluate an instructor's fair use claims on a "case-by-case basis," case outcomes depend on "fact-specific inquiry" within the context of use (Copyright Act of 1976, 2012). In other words, "there is no formula to ensure that a predetermined percentage or amount of a work—or a specific number of words, lines, pages, copies—may be used without permission" when applying the standards of fair use (Copyright Act of 1976, 2012). While fair use may mean free use and reproduction of educational content for some faculty, it also may not.

Where traditional copyright reserves all rights and asks users to make vaguely educated guesses about what is fair, open licenses clearly indicate how only some rights have been reserved by intellectual property holders, that others may use and share digital content more generously. In 2001, Creative Commons formed as a nonprofit organization, to organize and manage open licensing efforts around a basic set of
permissions. The least restrictive license, the *Attribution License*, (CC BY) allows users to copy, share, and edit a creative work so long as they credit the original content creator in their use. Creators may impose additional stipulations on attribution by requiring any resulting works of creative use to be licensed in kind with the original (Attribution-Share-Alike license), prohibiting any users to not profit commercially from their use (Attribution-NonCommercial license), allowing use and sharing but no customization of content (Attribution-NoDerivs), and any other more-restrictive combinations (Stacey and Pearson, 2017). Even the most restrictive open licenses grant no-cost (re)use and sharing of a person's intellectual property in terms that are easy-to-read, follow, and enforce. This innovation thus matches the ability of standard copyright to ensure authorial ownership of creative works while also becoming unmatched in its capacity to clearly define and guarantee the ongoing utility of content.

Hilton, Wiley, Stein, and Johnson (2010) devised a framework for thinking about the utility of openly licensed content with the Four R's of Openness (reuse, revise, remix, and redistribute). This descriptive framework has since been updated to include a fifth R that permits one's ability to "retain" resources forever (Wiley, 2014). By utilizing open licensing, those who adopt and potentially modify open content must recognize the original author and honor that author’s choices about what the transformation of a text might look like. Likewise, the creators of original content are also, presumably, encouraged to continue developing, sharing, and maintaining, their licensed works. From this understanding, discussions of openness turn toward the sustainability and scalability of content: creation sponsors new use and creative practice (Downes, 2007). In education,
the sustainability of an OER project, the “project’s ongoing ability to meet its goals” (Wiley, 2007, p. 5), finds additional complexity when use is accompanied by questions of how learners will access educational content. Faculty are unlikely to pose such questions, however, unless students make-known the difficulties that they encounter in accessing course content and/or professional development has preconditioned an instructor to consider student barriers to access.

**Optimization Around Openness**

The need to ensure portability, curation, design, accessibility, and integration of open content alongside other instructional resources has led university staff, students, and academic leaders to get involved with OER initiatives (Lashley, Cummings-Sauls, Bennett, & Lindshield, 2017; Salem, 2017). Salem, in particular, recognizes important student success projects in the need to ensure student access to educational resources. In cases where the design of pre-existing OER does not appropriately accommodate certain students and their use, specialists like instructional designers may become important allies for helping instructors incorporate digital media in instruction, package resources in more portable formats, modify content along the lines of universal design, and generally honor best practices for the delivery of educational content (Wiley, 2007). Those who support online and technology-enhanced learning may further improve the access to and integration of resources as part of an institution's learning management system (LMS), optimize content for broader online distribution, and train faculty on creative tools that are available at a given institution (Rambe & Dzansi, 2016). Library services are capable
of addressing processes in formatting/design of OER for publication, negotiating permissions, promoting OER, and building supportive relationships/workflows (Goodsett, Loomis, & Miles, 2016). In many ways, universities are already well equipped to implement OER just as they would any other educational resources.

With institutional investments in faculty adoption of OER comes a new imperative to prove efficacy in teaching and learning. When stakeholders (e.g. students, faculty, administrators, staff, politicians, etc.) consider OER to be an innovation and therefore as an intervention that is different from current practices and initiatives, resulting calls for additional allocations of funding and resources should seem unsurprising. While OER are free to use, the use, development, and support of these materials harbors costs that may have otherwise been covered by publishers traditionally. As a result, the financial backing of initiatives related to open education in general and OER, in particular, is almost always contingent on proof that these interventions do indeed promote access to, ensure affordability of, and deliver quality to educational experiences (Atkins, Brown, & Hammond, 2007). While the effectiveness of commercial educational resources in education is seldom called into question, a growing number of researchers have sought to prove the value of investing in OER. In recent years, OER-specific efficacy studies have spanned disciplines, offered clear guidance about assessing effective OER implementations, and generally set a reasonable basis for comparison between conventional and open solutions. This body of research has generally proven that the vast majority of students and faculty perceive OER to be at least equal but sometimes superior in terms of quality when compared to traditional textbooks (Hilton,
Given the potential of openly licensed content to define the standards of use, support academic freedom, and inspire the revisions of faculty, however, instructors will likely not need this empirical evidence in order to start exploring OER in their own courses.

As OER research has primarily focused on proving the efficacy of initiatives that streamline adoption of OER, an unexpected and presumably unwanted byproduct is how these findings get appropriated in the research and development of platforms, resources, and campaigns by commercial interests. A growing trend in recent years is the co-opting of terms, findings, and resources from the OER movement by major publishers [see Pearson (2018)]. Additionally, the sophisticated infrastructure at the disposal of these companies is arguably unmatched by educational institutions in terms of bandwidth for developing learning content, platforms, and experiences. In the recent examples set by the publisher Cengage, and their redevelopment of the Mindtap platform to host and allow modification of OER alongside Cengage-owned resources behind a small student access fee, it becomes easy to confuse and/or take advantage of the understanding of those who are uninitiated into the concepts relevant to OER. With research finding that only 25.6 percent of instructors in the United States may be “Aware” or “Very Aware” of OER (Seaman & Seaman, 2017), there is cause for concern about how easily research about OER can be contorted in favor of private companies as they focus on the reduction of costs over the removal of costs, conflating use with edutainment via ancillary multimedia experiences, coupling discussions of student outcomes with learning analytics dashboards, and clouding perceptions about OER by supplementing them with
commercial resources. If the popular talking points for OER continue to linger around cost savings (Wiley, 2016, November 07), day-one access to content (Jaschik & Lederman, 2018), and the difficulty of finding/using openly licensed resources (Seaman & Seaman, 2017), commercial developments in these spaces are not wholly betraying such causes (Wiley, 2017). Such solutions, however, do little to help academe reclaim pedagogical and curricular decisions from publishers.

**Pedagogy Reclaimed**

Relatively recent discussions in OER are moving conversations away from saving money—referred to by the OER community as “cost framing” (Wiley, 2016, October 27)—to creating value for students by including them in activities made possible by the 5 Rs of open licensing. Referred to by phrases like "open pedagogy" (DeRosa & Jhangiani, 2017) and "OER-enabled pedagogy" (Wiley & Hilton, 2018) these projects explore how faculty and students alike may take part in the process of creating and customizing OER. Such learning opportunities transform the role of students from consumers of knowledge to producers and undermine the more ineffectual banking models that have long riddled formal education (Freire, 2000). Though such pedagogical practices harken to the broader umbrella of constructivism, they are perhaps best paired with the constructionist advance that while “building knowledge structures” is important to both philosophies of learning, "learning-by-making" artifacts that represent and maintain a public identity is even more worthwhile (Papert, 1991, p.1). Both the objects and activities produced by OER-enabled
pedagogy harbor value: (1) the activities may evoke a sense of ownership in learner/creators and (2) enforce a sense of expertise within students as they openly license their scholarly work as OER—prime to be adopted, used, and transformed by others.

Examples of such pedagogical interventions are growing because the implementation of OER-enabled pedagogy, like OER, does not require much more than the knowledge and will of an instructor and her students to get started. For instance, the University of California, San Francisco has offered an elective class that builds on the work of WikiProject Medicine in improving the quality of the medicine and health-related articles on Wikipedia (WikiProject Medicine/UCSF Elective 2013, 2015). While participating in the course, student pairs take responsibility for reviewing and updating an entire Wikipedia article. As part of this effort, they verify content accuracy, guarantee that medical sources are used and up to date, and honor Wikipedia’s criteria for good and featured articles. Rather than write articles or critiques to be turned in and perhaps never consulted again once a grade is earned, students work publically: the scholarly content that they produce serves and will continue to serve anyone who is seeking information which sets an example for others to follow and begs ongoing efforts in reviewing, editing, and publishing Wikipedia content. This prospect trades “disposable assignments”—projects that have little relevance outside a particular classroom context—to “renewable assignments” that hold value beyond a given course term and promote opportunities to teach others in ways that are broad, ubiquitous, and span a lifetime (Wiley, 2013). Other examples that serve more traditional classroom contexts are those where instructors and
students work together in developing an open textbook from the ground up (DeRosa, 2015) or revising a pre-existing open textbook to better serve the needs of a specific learning context or population (Amado et al., 2012). What persists as an obstacle for learners (faculty or students) who want to take advantage of the 5R permissions, however, are the technical aspects of modifying open content (Hilton, Wiley, Stein, & Johnson, 2010). Access to content and rights to modify do not guarantee that a person has the skill set or requisite tools to do so.

With scaffolding and apprenticeship from aptly skilled class members (including faculty), renewable assignments may be successfully tackled at both the graduate and undergraduate level. In cases where faculty might assume this mentorship role, however, where do they attain the technical proficiencies necessary to modify digital content? As I mentioned earlier, university resources are often available to assist faculty, but do these services extend to students and will they accommodate the scheduled meetings of a particular course? Another means of curbing the technical challenge of revising digital content may come by way of ALMS Analysis which asks open content creators how they might give users the "technical keys" necessary to unlock OER and adapt them to local needs (Hilton, Wiley, Stein, & Johnson, 2010, p. 42). This framework asks creators to answer the following questions:

- Can users "Access" the tools necessary for editing?
- What is the "Level of expertise" necessary to alter an OER?
- Does the content lend itself to "Meaningful" edits?
- And are users able to receive "Source-file access"? (p. 42)
If authored under these conditions, the tools necessary to crack open an OER will likely be available for anyone regardless of institutional affiliation. That is, if any additional resources are needed beyond the conditions of use already granted by the open license. While these projects go a long way in serving the practical need for developing and sharing more high-quality, openly licensed educational content, they also exemplify application of favorable learning theories like cognitive apprenticeship (Collins & Kapur, 2014), situated learning (Lave & Wenger, 1991), communities of practice (Wenger, 2010), and intrinsic motivation (Lepper and Henderlong, 2000)—all of which posit that learners draw deeper understanding from being immersed in a rich web of collaborative learning practices, multidisciplinary associations, and problem-solving contexts.

The pedagogical outcomes associated with open pedagogy are clearly not unique to OER nor do they rely on the existence of open licenses to generate and modify original content. Assignments that incorporate openly licensed content in approachably practical problem-solving applications are uniquely valuable, however, in their capacity to drive academic communities toward more malleable considerations about what educational resources are, who is capable of authoring them, and how the quality of these materials might be assured. This notion assumes, of course, that OER-sponsored practice does not eventually succumb to the "hype cycles" of other technology wherein the expectations for a specific technology do not align with the amount of time that would be necessary to see that innovation become viable for business (Gartner, n.d.). Ultimately, when we position universities as businesses first, efficiency reigns over technology acquisition, implementation, and support.
In Service of Innovation

Faculty hold inconsistent levels of awareness about the technologies of teaching and learning. Because every professional development opportunity will come pre-populated with its own mix of more knowledgeable others (Vygotsky, 1978), literacy sponsors (Brandt, 1998), and connected learners (Downes, 2010), the goal for many of us who lead faculty training is to engineer narrow outcomes for new skill acquisition that are attainable but also marketable as the most broadly applicable. Commonly, we refer to the proficiencies that we sanction as best practices. As Snow (2015) reminds us, these practices are often in service of "smart business moves" and rife with "self-perpetuating" practices that "don’t make you the best. They make you the average of everyone else who follows them" (paras. 9-11). In the case of OER, the adoption and use of open textbooks may seem like a “best practice” for stakeholders in addressing issues of cost and access in higher education since faculty may already use textbooks in their classes. The threshold for adoption is thus low and the familiar form of textbooks may incline such faculty to update and revise content where needed. For these instructors, the prospect of transitioning to an open alternative seems economical in terms of time, effort, and financial investments. Students have likely made use of textbooks throughout much of their education and should be familiar with navigating the information design of a textbook. Even university support staff—already accustomed to delivering textbooks through integrations with the learning management system or making versions available through other means—may treat open textbooks (especially developed in observance of
the ALMS framework) like any publisher content. Since the open textbooks subgenre of OER is immediately familiar to all of these groups and thus requires the fewest new investments in terms of training and support, it appears to be a "smart business move."

Scenarios in which open textbooks perpetuate the same practices among teachers and learners that commercial textbooks had previously may inevitably arise when expedient and affordable business processes drive supported practice. If the value of an open textbook is first and foremost its resemblance to commercial textbooks, what cause is there for users to adapt their use for new ends? As a result, those of us who sponsor educational technology use are at a self-inflicted disadvantage when we attempt to gauge the success of technology adoptions; we can only really judge how closely the activities of those we train mirror what we trained them to do. From this vantage point, we build taxonomies that winnow away the complex values, motivations, and exigencies of a user so that they may fit into one of the procrustean beds we have set for them under heuristics like, TPACK (Harris & Hofer, 2011), SAMR (Puentadura, n.d.), the Pencil Metaphor (McKeown, 2006), Diffusion of Innovation (Rogers, 1995), and other frameworks by which we associate individuals with multiple stages en route to our idealized sense of technology use. As the hierarchies that emerge from such models inspire us to broadly and classify the character of each user (e.g., leaders, laggards, etc.), Gould (1982) cautions the tyranny inherent in such taxonomies: "We are the namers of things, who impose our words upon the world" (p.7).

When we recommend that faculty should adopt an open textbook because doing so is as easy as adopting any other textbook or because research has proven the efficacy
of this technology in education, we are shackling the value of this form of OER to its positionality as familiar, not its instrumentality as a mechanism for new educative practice. We are also prescribing an identity of “textbook user” on all faculty. Whether they actively use textbooks or perhaps have only done so as a student, such taxonomies account for individuals on the same continuum—one that suggests those who do not use a specific technology could/should. However, instructors choose to respond to this value proposition is then classified on a spectrum from those who already use (in some way) to those who are on the path to use (if we pitch the outcomes of use in just the right way). But when we only examine and classify practices in the continuum of intended use, we will inevitably fail to recognize unintended, creative, otherwise inventive applications of technology.

The expectations harbored by those of us who advocate for OER often align with those who promote technology-enhanced instruction in general: we value a given technology for the educational outcomes of its use and therefore want to encourage its adoption by the academic community. For Rogers (1995), “A technology is a design for instrumental action that reduces the uncertainty in the cause-effect relationships involved in achieving a desired outcome” (p. 12). If we regard OER as a technology, the factors encumbering one's adoption of OER are not necessarily the content of a resource but its perceived lack of instrumentality in meeting the desired outcomes of a particular time and place. As such, Rogers finds that the value of adopting any innovation—"an idea, practice, or object that is perceived as new" (p.11)—is greatly dependent on adopters’ perception of novel utility across time and social system (p.10). For an instructor, if the
affordances of open content do not seem like a new proposition, if its newness does not seem desirable, if its novelty is not appreciated by others, or its existence as a unique innovation is unknown, she might reasonably dismiss the potential of OER to augment her instruction. In the case of faculty who have attended OTN training, they are aware that using OER may prove innovative because that is how others have come to appreciate it, but the newness of its form and function may be more difficult to discern. After all, giving students free access to information is not a new idea, nor is creating and compiling course content to better engage specific students. Then, of course, there are digital textbooks which are hardly a unique means of content delivery. For these reasons, I find it difficult to consider OER an innovation as defined.

The innovative aspects of OER are more appropriately associated with how open licenses afford novel use of educational content. The activities that open licenses enable for intellectual property breaks certain norms for teaching and learning. Rogers identifies norms as "established behavior patterns for the members of a social system" (p. 26). Because implementation and adoption of OER are what normalize it as an instructional technology\textsuperscript{18}, it behooves advocates to focus less on OER as product or tool and more on the practices permitted under open licensing if we wish to catch the attention of others as they navigate educational contexts. As fans of the learning objects concept found

\textsuperscript{18} These technologies are used, expressly, to aid teaching and learning. In this context, the qualifiers "instructional," "educational," and "learning" are not significant in so much as they isolate some technology as "for educational purposes," where other technologies might best sponsor entertainment, utility, and general use outside of an educational context.
previously, the provision of free educational content can prove too abstract for many educators to fully appreciate without tangible snapshots of instrumentality.

With learning objects, Wiley (2000) envisioned small educational resources that could be shared, collected, and combined to assist educators in building online learning environments. Rather than tasking faculty and instructional designers with developing courses in their entirety, learning objects were designed to work like building blocks—small, modular pieces of educational content that, when combined with one another, produced larger structures. The sensibility of community built, shared, and (re)used assets to aid an individual's productivity is “grounded in the object-oriented paradigm of computer science” (Wiley, 2000, p. 3). And such practices continue to influence fields like game design, web design, and software development where crowd-sourced creation and sharing of assets can significantly ease the development process for video games, websites, and other software [e.g., GitHub (github.com)].

While prefabricated blocks of content may continue to aid more educational endeavors like online course development, Wiley and others recognized that the rote use of learning objects has proven consistently more compelling than creative activities like reuse, remixing, and recreation (Butson, 2003; Weller, 2007; Wiley et al., 2004). Learning objects have been valued more as products to consume than as an innovative means of producing novel learning experiences. “Consequently,” Wiley (2010) claims, “[T]he thought-shaping power of the popular learning objects metaphors and the influence of ambient copyright have needlessly restricted our thinking about the reuse of learning objects” (p. 9). What resulted for learning objects and continues to condition
OER, is a need for definitions of open that could reliably identify the consumptive and productive activities that could ensue: those that inspire users to not just use but also create. The difference, for education, is as simple as the ability of an instructor to select, compile, and align OER around the learning experiences and outcomes of their curriculum instead of conceding instructional design choices to the inflexible content and organization of a commercial textbook. Yet, the decision to use technology in innovative ways is not always an individual’s to exclusively make.

**Conceptual Framework**

Just as faculty values face certain compromises when attending to instructional changes, so do instructional designers. McDonald (2010) calls attention to the never-ending quest to cut costs, the stress of working too many projects at once, and the insistence of team members that the common formulas justified by “just the way we doing things” are merely a few of the pressures that drive designers into the pull of technological gravity—the clear attraction of using of formulaic practices, generic tools, casual beliefs, and underdeveloped processes to obtain instructional certain outcomes (p. 8). In response, McDonald proposes metaphors that promote instruction-as-story and instruction-as-practice to offset technological gravity among designers as these associations “emphasize characteristics of an instructional experience that are not always apparent when only considering common definitions of the term” (p. 9). For faculty, however, mulling over “what instruction is,” “how instruction is made,” and “what instruction is for” may seem trivial in the scope of those stressors and priorities.
mentioned at the beginning of this chapter. Rather, the merits of technological gravity may organically emerge from scenarios in which the quality of a learning experience is evaluated on the basis of how it meets expectations, not how it exceeds them. If asked to make an instructional video accessible, why would a faculty member pursue additional knowledge about universal design when only captions and a transcript are expected? When teaching an online course developed by someone else, why would an instructor modify the template and its content any more than is necessary or directed? And, when an academic professional signs up for an open textbook workshop because her participation is incentivized, why should she do anything more than expected to earn social credit for her participation or secure the stipend advertised to her. In any of these cases, she has an *ethos* to maintain.

Considerations of ethos are at the core of this study. Such a preoccupation assumes that an instructor’s actions (educative or otherwise) elicit signs of interest, effort, and importance which, in turn, leaves an analyzable record. The evidence of one’s ethos makes suggestion about the values that shape her character. In the context of teaching and learning, the concept of ethos may be difficult to analyze for its association with terms like “‘ambience’, ‘atmosphere’, ‘climate’, ‘culture’, ‘ethical environment’, and the like” as well as its broad distribution among “the wide range of aspects of and work of the classroom and school through which it is manifested and in the wide range of modes of influence in which it is embedded” (McLaughlin, 2005, p. 309). Because my philosophical understanding of ethos originates in composition studies, however, certain heuristics for comprehending ethos have historically emerged from analyzing the rhetoric
of one’s utterances, gestures, actions, and creative material—all of which are available as data via survey and interview research methods.

Derived from the word ethea—a Greek reference to an “essential dwelling and habitation” of animals specifically—interpretations of ethos make metaphorical reference to a place or state of being that is naturally occurring, primal, and not yet subjugated by rationality (logos) (Haynes, 2016, pp. 48–49). In her review of this definition for ethos, Haynes observes that “ethos, when dominated by logos as rationality, has come to mean a form of habituations that goes against a very basic instinct” (p. 49). In other words, the characteristics of one's ethos predate and therefore predetermine her rational efforts to reflect on and reconcile the logic of her ethos. The difference between the terms is the difference between being and knowing one’s self. Yet, Haynes reminds us that the irrational qualities of one’s ethos still exhibit a sense of rationality: just as one can observe the differences and conflicts that emerge across the ethea, so too can ethos emerge among the social behavior of those who reside there (p. 50). The observable patterns that arise when someone navigates her ethos support Saldaña’s suggestion that values coding lends itself toward the empirical investigation of a person’s ethos by identifying and qualifying the relationships that emerge from her values, attitudes, and beliefs (p. 201). Worth noting, however, is that not all activities may be volunteered by a subject. Without a clear conception of a person’s identity, any assessment of her activity is at the mercy of what she is willing to share.

The function of ethos as both irrational foundation and rational record of one’s activity shares remarkable similarities with what Foucault refers to as those technologies
of the self that “permit individuals to effect by their own means or with the help of others a certain number of operations on their own bodies and souls, thoughts, conduct, and way of being” (p.18). Briefly, ethos may be considered a technology of the self in so much as it accounts for the natural and social means by which a person engages with the world around her. For Foucault, the technologies of the self seldom function independent of the technologies of production (means of creating and manipulating things), technologies of sign systems (means of signifying and translating meaning), and the technologies of power (means of objectifying and controlling subjects). Yet each is associated with its own form of domination (p. 18). Technologies of production and sign systems lend themselves to more scientific and language-based inquiry, whereas technologies of power and the self disclose the governing forces that exist between a person with herself and that person with others (p. 18–19). These associations complement Gee’s (2001) insistence that identity could serve as a powerful analytic lens in social science research. His construction of identity advances four areas of inquiry:

- Nature Identity (N-Identity): conceptions of who a person is and where they are from
- Discursive Identity (D-Identity): the negotiation of who a person is in relation to others
- Institutional Identity (I-Identity): the influence of authorities and the pressures that impose a sense of duty/responsibility on a person
- Affinity Identity (A-Identity): allegiance to, access to, and participation in specific practices with others (Gee, 2001, p.100)
Thus, where analysis of subjects and language likely concerns matters of nature and discourse respectively, so too are institutional and affinity identities linked to the technologies of power and self-constitution. If formalized, the relationship between one’s identity and the technologies that surround her may also imply a temporal dimension that considers when a person’s sense of self may be most effectively mediated by technology.

Specific to this study—one that generally seeks to understand why some instructors respond differently to the prospect of change than others—it seems worthwhile to consider not only how an instructor’s identity is formed but when. As a faculty member’s attitudes and values trace the nature of her identity and output, these negotiations seem foundational in that they are situated in past experiences (e.g., how she feels about textbooks is the product of past experiences). Alternatively, the affinity identity of an instructor, which is situated in the aspirations that emerge from her values and beliefs, suggests a forward-thinking and more proactive negotiation of values (e.g., how she regards a textbook’s value and potential derives from future possibility).

Institution identity—rife with embedded power relations—is actively shaped by and responsible for shaping the attitudes and beliefs of those who teach for a living (e.g., an instructor’s current impression of a textbook is beholden to the active influence of the institutionalized power structures reflected in her attitudes and beliefs). Finally, I argue that negotiations of one’s discourse identity and the sign systems that inform it transcend linear time; discourse is a means of negotiating one’s sense of self both privately and publicly across time. Thus, consideration of how one’s identity and values shape her ethos undergirds the conceptual framework of this study in so much as this is the realm in
which any faculty member determines the importance of an endeavor and develops
instrumental senses of interest and effort that are necessary to complete associated tasks.

Figure 2.1 documents the interrelationship of values and identity as described above and
proposes that one’s ethos is synonymous with her motivating values by way of
discourse—the worldview of a person that emerges rhetorically from her utterances and
actions alike. In relation to the subjects of this study, this framework suggests that the
motivations inspiring an instructor to act (or not) may be synthesized in a variety of
situations.
Figure 2.1: An empirical framework for studying ethos. This figure illustrates the interplay between values, identity, and technology in constructing an individual’s discursive identity.

Summary

As outlined in this chapter, many compelling, practical, and data-driven justifications support OER use in postsecondary education. Yet, the literature suggests a complex web of competing motivations mediate a faculty member’s capacity to initiate use and persevere as a technology user. Variable awareness, training, or rewards, can make all of the difference between those faculty who attend the OTN workshop, review
an open textbook, and go on to adopt one versus those who attend, (perhaps) review, but
do not adopt the technology. Likewise, abstract definitions of openness, commercialized
conceptions of innovation, and the attractiveness of observing a technological status quo
ensure a certain degree of friction for the design and delivery of engaging faculty
development opportunities. Because a plethora of internal and external, living and
nonliving influences condition the educative acts of faculty, the interests and efforts
recognizable across faculty choices will tend to cross more boundaries than “I completed
the task because it was valuable” or, alternatively, “I did not complete the task because it
was unimportant.” Decisions about instructional change are as personal as they are social.
In the following chapter, I will further explain the methods used to discern the situational
values, positionalities, and activities of faculty within a larger web of social worlds.
(1) Everyone has the right to freedom of peaceful assembly and association.
(2) No one may be compelled to belong to an association.
(“Universal Declaration of Human Rights,” 1948, Article 20)

By spring of 2018, OTN post-training survey records indicated that 76 of the 2,388 faculty workshop attendees had indicated that they would not adopt open textbooks (D. Ernst, personal communication, January 30, 2018). Considering OTN training is developed to specifically encourage the vetting and adoption of open textbooks, this population is unique compared to other educational technology non-users due to their training on issues and resources in open education. They had attended a two-hour workshop on topics related to OER, likely perused the open textbooks available in the OTL, in many cases reviewed an OTL textbook, and still indicated that they were not planning to utilize such materials in their own classes. As the OTN spans nearly 1,000 post-secondary campuses (Cohen, 2019), there is a strong likelihood that these 76 faculty work at separate institutions, occupy multiple academic disciplines, and teach a variety of courses. It seems worthwhile to consider, however, who is present and who is missing from the OTN data.

The OTN Surveys all faculty workshop attendees, not just those who complete a review. 45 percent of faculty who attended workshops have indicated that they have or will adopt an open textbook in their courses (D. Ernst, personal communication, January 30, 2018), but there are two other options on the scale that are not accounted for by this
percentage: “I do not plan to” and “I’m undecided if I will” adopt an open textbook (Table 1.1). The percentage of those who are undecided has stayed “pretty consistent” over time at 26 percent (D. Ernst, personal communication, January 30, 2018), and these respondents far outnumber the 76 who indicated they were not planning to adopt open textbooks. Combining those who are undecided with those who said “no,” nearly 700 of the 2,388 total faculty who have attended OTN workshops may have benefited from additional communications and training about open education concepts. Further, since the response rate for the post-workshop survey is 74 percent, the intent of another 573 attendees has not been captured as part of the 2,388 responses collected through post-workshop surveys so far (D. Ernst, personal communication, January 30, 2018). Though the OTN’s process yielded a list of 76 OER-informed non-adopters of open textbooks, the remaining gaps in the data are worth exploring in subsequent research of respondents to the OTN post-workshop survey. For the sake of exploring the motivating values of faculty who did not plan to adopt open textbooks after OTN training, the 76 attendees who were identified by the post-workshop survey both sufficed for this study and, because they already participated in the OTN survey, were perhaps willing to offer descriptive rationales for their positions on open textbooks.

Population and Recruitment

The 76 faculty members who attended OTN training and, maybe, reviewed an open textbook served as the selective, purposeful sample of this study. They are purposeful in so much as they would sponsor information-rich cases "from which one can
learn a great deal about issues of central importance to the purpose of the research" (Coyne, 1996, p. 624). Though many other faculty members have attended OTN workshops, completed reviews, and pursued various forms of OER adoption, the 76 who I approached for this study had clearly identified plans to not adopt open textbooks in the future. This volunteered intention is of central importance because these faculty were under no obligation to provide this information to the OTN and, because they did, their positions on open textbooks seems more richly resolute than those who are undecided about future adoptions. Studying a population that has been identified by a shared, purposeful position seems like effective means of addressing the Hawthorne effect: simply, neither I nor any researcher could influence these faculty to not take credit for their position on open textbooks.

In the process of contacting this population over email, one asked to be removed from the list, and three emails bounced. This phenomena—members of this population opting out of or evading mechanisms for ongoing contact—is worth noting for those who maintain records related to this population (whether centrally as part of the OTN or local to a specific institution). If the study of this population continues, it is imperative that contact information for this sample is as up-to-date as possible.

Before contacting study participants, I consulted David Ernst, Executive Director of the OTN, who then solicited approval from the OTN steering committee—a governing body populated by representatives from member institutions who serve on a rotating basis. Though the steering committee had previously approved my study in Fall 2017, some of its membership has rotated in the interim. Because professional development
under the OTN honors a train-the-trainer approach in which OTN representatives train local support staff to deliver and assess workshops among their own constituents, this study was going to challenge this distributed arrangement in two ways: (1) faculty were to be contacted about their OTN experience by someone outside of their institution, and (2) I was operating not as a representative of the OTN but as an independent researcher. Though the steering committee reapproved my research, they requested that David Ernst send the initial email to participants. This initial call for participants is available for review in Appendix B.

Upon Institutional Review Board approval, the OTN provided a list of names and emails for the 76 faculty who constitute the population defined above—faculty who, after learning about and vetting open textbooks, indicated in the OTN's post-workshop survey that they did not plan to adopt open textbooks in their courses. In the process of seeking Institutional Review Board approval, I contacted offices at both Clemson and Boise State University for advising about whether one or both would need to review my application for human subject research. Additionally, I wanted confirmation that I would not need to seek IRB approval from every institution harboring the participants of my study. Boise State’s office waived their jurisdiction and Clemson’s office confirmed that only they needed to sign off on my exempt research.

The pre-interview survey that I developed in Qualtrics was available from the time the first email was sent on February 23, 2018. The informed consent of faculty was secured by way of an information letter attached to the email and through respondents' subsequent completion of the questionnaire. Over the course of two weeks, prospective
study participants received three reminder emails. These emails are also available for review in Appendix B. Faculty who were interested in volunteering for follow-up interviews answered a corresponding survey question affirmatively. As survey results came in, I took note of volunteers and updated any contact information that they provided in the questionnaire. Not all who indicated that they were interested in conducting follow-up interviews (n=15) went on to schedule interviews with me. The 10 that did, however, participated in hour-long interviews online.

Incentives were distributed to eligible study participants in two stages. First, by random drawing, I provided a $100 Amazon gift card to one of the faculty members (n=21) who completed the pre-interview survey. Second, the OTN distributed $50 Amazon gift cards to interviewees (n=10) upon the completion of their recorded, Zoom-based sessions with me. The compulsion to incentivize participation in this study resulted from my consideration of how OTN member institutions likely used monetary stipends to attract the workshop attendance of these faculty in the first place. Relative to the incentives recommended by the OTN in those engagements ($200 for faculty who attend training, study an OTL textbook, and write a review), the incentives of this study proved alluring enough.

**Research Design and Rationale**

**Survey.**

Study of this population consisted of first surveying the population (N=76/2,388) of faculty who indicated that they were not interested in adopting open textbooks and
then following up with a purposeful sample of 10 faculty members over hour-long, semi-structured interviews conducted online over the Zoom web conferencing platform. The brief questionnaire that I developed using Qualtrics, could be completed in under 10 minutes and adapted questions from the Babson Survey Research Group’s report, *Opening the Textbook: Educational Resources in US Higher Education* (Seaman & Seaman, 2017). The questionnaire design of the Babson multi-year study was consulted not for the purposes of validating the instrument but because it surveys faculty from across the United States (2,700 in the most recent survey), is sensitive to faculty confusion over terms like "open" (p.42), and focuses on OER in general instead of a particular type of OER (e.g. open textbooks). Because of this broader focus, however, some questions were either eliminated or revised to more specifically address features of open textbooks and licensing as they were discussed in OTN training. Appendix C offers a comparison of the Babson questionnaire with my adaptation, while my survey instrument itself is available for review in Appendix A.

The role of this pre-interview questionnaire was to assist me in collecting basic information about who these instructors were by nature, affiliation, discourse, and participation—traits that might help me structure rich interview sessions with a diverse set of interview participants. This emphasis on collecting and analyzing data about social demographics (N-Identity), professional status (I-Identity), faculty relations (D-Identity), and familiarity with those concepts relevant to OTN training (A-Identity) capitalizes on Gee's (2001) framework for considering identity as an analytical lens. My assumption here was that instructors are, in some sense, capable of identifying themselves and that
any matters related to their professional appointments and course material choices reflect their identities in meaningful ways. Since this, indeed, proved to be the case, subsequent interview discussions benefitted from my being able to both acknowledge and reference the heterogeneous traits found across the pre-interview surveys. This survey data allowed me to personalize lines of inquiry which, in turn, enriched my relationship-building with interviewees. Further, stable concepts of identity led to productive values coding (Saldaña, 2009), drafting of analytical memos, and situational analysis of data (Clarke, 2005), because any dissonant responses were easily discernible and thus explainable within the context of how comfortable participants felt confiding in me.

Because these faculty presumably occupied a common base of understanding of OTN workshop topics by way of their collective participation, I administered a pre-interview survey to both conjure and level-set their recollection of events. Rather than inductively tease-out general conclusions from specific, disparate observations as is often the case in survey-only research, following surveys with semi-structured interviews allowed me to abductively piece together how information retained from the workshop might have conditioned survey responses and pursue these incomplete observations more fully during interviews. The output of interviews thus provided more comprehensive insight about faculty decision-making in particular situations—in this case, those factors that motivated instructors to indicate that they would not adopt open textbooks when they could have either adopted, signaled that they might adopt someday, or just not participated in the OTN’s follow up survey. Summaries of pre-interview survey responses for each participant and the generic interview script that was adapted to probe
survey answers from each interviewee are available for review in Appendices D and E, respectively.

**Interview.**

To account for the likelihood of the Hawthorne effect, my interview protocols leveraged Oswald, Sherratt, & Smith’s (2014) six-stage protocol to encourage relationship building and trust with research subjects. Though their protocol explicitly focuses on ethnographic research, in particular, it also posits that relationship building can help researchers overcome the “challenges of emotion, sensitivity, tension, stress, pressure and uncertainty” that I needed to address while inquiring about the motivations and experiences of my interviewees. Additionally, Oswald, Sherratt, and Smith claim, “Relationships are built through conversations,” and, since conversation was the only mechanism available to me through interviews conducted over Zoom, I held the reasonable belief that building the sort of relationships that the authors describe in their six-step framework would “not only improve the quality of data but also reduce the chances of the findings being influenced by the Hawthorne effect” (p.58). Given my background in rhetorical analysis and determining the exigence, audience, and constraints that occupy a given rhetorical situation (Bitzer, 1968), I would erect a sort of discursive mirror in my conversations with interviewees: using the six-stage protocol to structure how I reflected the values, confirmed the choices, and instigated the confidence of those I interviewed.
In stage one, “Gauge the person,” I was able to determine certain identity characteristics of interviewees based on their responses to pre-interview surveys (e.g., their age, experience level, the nature of their faculty appointment, their familiarity with open education concepts, and their relationship with course materials like textbooks) and “gauge both the type of participants and the setting” (Oswald, Sherratt, & Smith, 2014, p. 60). Based on the results of stage one, I adjusted certain parts of the base interview script (Appendix E) for each interview based on each respondent’s survey responses (Appendix D). For example, if a participant indicated extreme favor or disfavor for certain affordances provided by the five Rs of open licensing, I would update my interview script to cite their specific positions and ask for additional explanation of their answers. I was less inclined to reference more tepid responses to Likert scale questions about favor and awareness in the survey because they would presumably not be as informed by a person’s values as more extreme answers. Doing so honored stage 2: “Create a non-threatening perception” (Oswald, Sherratt, & Smith, 2014, p.60). Depending on the information that interviewees volunteered by way of survey responses, I could speculate about the sort of image I should portray. As Oswald, Sherratt, and Smith found when researchers would not introduce themselves to those being observed, “It would make the workers question themselves as to whether they were carrying out their role correctly and make them more likely to make a mistake” (p. 61). By not emphasizing my authority over the topics of discussion and by citing prior experience and active standing as an adjunct instructor, doctoral student, and early-career researcher, I was able to position myself in a non-threatening position relative to my interviewees.
Our shared experience in teaching postsecondary students served as a means of opening “introductions” and “establishing rapport”—stages three and four, respectively. Regardless of disciplinary affiliation, I could find common ground with every interviewee based on the familiar contexts of working and teaching in higher education (e.g., conducting research, serving on committees, adapting instruction to aid students, selecting course materials, teaching through different online and on-ground modes, collaborating with colleagues across the university, reflecting on teaching philosophies, and so on). Every interview opened with a review of their institutional role as indicated through survey responses so that I could correct, narrow, or broaden understanding of their institutional identities, compare it to my own sense of institutional self in higher education, and convey a sincere interest in any similarities or differences in our roles and responsibilities. This approach to introductions, one that situates a researcher as authentically interested in the positions of those being studied, is something that Oswald, Sherratt, and Smith consider a “good strategy” (p. 62). I enacted other strategies to establish a rapport throughout interviews by way of maintaining agreement visually (through body language, eye contact, nodding, smiling, etc.) and discursively through verbal affirmation, appropriate compliments, and situating my approval within the context of our conversation (recalling interviewee’s earlier statements, illustrating others’ points with my own life experiences, and speculating about how their answers will continue to influence my thoughts on the topic of conversation). Though I did not always agree with my interviewees, I could always agree with where they were coming from with a given perspective. Oswald, Sherratt, and Smith validate such behavior as ethical in
that, “establishing rapport is about finding similarities with each other. Even if you disagree with 90% of what is being said, make it clear you agree with the other 10%” (p.63). I was able to find common, non-threatening ground on which to build rapport because work in postsecondary instruction exists on a continuum of influence and practice: we learn expectations for teaching from others, test them in our own classes, and modify instruction that will inevitably influence those who work alongside us.

This reality justifies the OTN’s reliance on faculty members as presenters for faculty workshops because many of us hone our teaching practice in direct response to our peers. This collegiality may go a long way toward navigating the sort of conversational nuances that Oswald, Sherratt, and Smith put forward in their fifth and sixth stages: “relaxed signal” and “link to conversation area” (p.65). Relaxed signals confirm that “participants feel relaxed around you” so that they are “more likely to express their true perceptions” (Oswald, Sherratt, & Smith, 2014, p.65) They claim that “a light-hearted comment or joke” from those being studied is the most significant indicator that this stage has been reached. With the relaxation of the participant confirmed, the relationship is presumably established enough to enter stage six and “change the topic of conversation to the researcher’s interest area” (Oswald, Sherratt, & Smith, 2014, p.65). It was here that I could more pointedly probe into the past experiences and future goals of interviewees with the presumption that doing so would not cause the faculty members whom I interviewed discomfort. Paired with the knowledge that interviewees’ identities would be anonymized, the six-stage approach to
interviewing as outlined above yielded over 11 hours of rich interview media to transcribe and code.

**Data collection and management**

Using both survey and interview protocols (Appendices A and E), I collected the following data from faculty: preferred name, preferred phone number, preferred email, approximate age, gender, ethnicity, employer types/resources, teaching status/background, types of courses taught, discipline affiliation, role in selecting course texts, types/licenses/features of course texts used, satisfaction with course texts, familiarity with licensing, familiarity with OER, confirmed level of participation in OTN training, perception of open textbook types/features, and perception of OTN training/resources. During interviews, I further probed into matters that directly related to identity as conceived by Gee (2001). Matters of one’s nature identity (N-Identity) account for who a person is and where they are from. Lines of inquiry that were relevant to N-Identity pursued the educational paths that led interviewees to where they are now, their personal goals as professionals in higher education, and how the cultures they identify with shape their worldview. Institutional identity (I-Identity) results from the influence of authorities and outside pressures that impose a sense of duty/responsibility on a person. Interview questions about their perception of other people and priorities in their respective fields, departments, and universities explored this conception of identity. Additionally, their familiarity with institutions of open licensing, the OTN, and OER
were also addressed through questions. Discursive identity (D-Identity) comes from the negotiation of who a person is in relation to others, and related questions focused on the relationships that faculty build and maintain with each other, their students, support staff, academic leaders, and the course materials they assign. Special attention was paid to interviewees' perception of others and how they articulated their own values through language. Lastly, consideration of affinity identity (A-Identity) notes a person's regard for, access to, and participation in specific desirable practices with others. Inquiry about the teaching philosophies or goals faculty have for their students is perhaps the most poignant exploration of affinity in this study because it locates the activities of students and teachers in the same affinity group (p.100).

Personal identifiers of participants (i.e. names, contact information) were removed during transcription. Survey results, Audio/video recordings of interviews, and subsequent transcripts were all anonymized under randomly assigned two-letter pairs (e.g., AB, BC, CD, etc.). In transcripts, my questions and responses were labeled "JL." Beyond their use in this dissertation, I made clear to interviewees through recruitment emails and in dialogue during interviews that any processed data may be published in academic journals, professional publications, or educational presentations. Published comments will not include participant names or contact information but may be attributed to a person’s age, discipline, ethnicity, gender, and/or professional status. After their participation concluded, faculty received an email thanking them for their participation and providing contact information for how to obtain a copy of the study’s results.
Data Analysis Methods

Because the population I studied had not otherwise been consulted by empirical research, I selected a grounded theory approach because of its "five basic components" for constructing new meaning: “theoretical sensitivity, theoretical sampling, coding, theoretical memoing, and sorting” (Brown, 2012, p. 255). All of these steps produced data that, in turn, was used to conceptualize theories based solely on the data generated by my study. I did not want to presume that the factors that do and do not influence faculty who adopt OER are the same for my population of non-adopters as they are for the technology users of other studies. Also, the abductive aims of my analysis sought to problematize the binary associations currently made about faculty in the literature (i.e. faculty who adopt OER are knowledgeable while those who do not are not; faculty who adopt OER have adequate time/resources while non-adopters do not), that future research might design more complex research projects and take up additional analytical lenses when studying the values, attitudes, and beliefs of faculty guides their decision making as both educators and people. The steps of my analysis followed Saldaña’s three-part coding process—first cycle coding, analysis, and second cycle coding. All steps were conducted using NVivo coding software. Also, per Saldaña’s suggestion, I drafted analytic memos while conducting first and second cycle coding. During the analysis stage, efforts in drafting meta memos assisted me in summarizing, reflecting, and integrating what I had learned to date (p. 39).

I used initial coding to break down interview data into “‘first impression’ phrases”—summarizing utterances as "I" statements (e.g., "I was pretty serious about a
career outside of academe") using annotation feature in NVIVO. I then conducted values
coding (Saldaña, 2009) for the first cycle review of these annotated passages, sorting
faculty statements as reflective of either their values (V), attitudes (A), or beliefs (B)
(e.g., "I was pretty serious about a career outside of academe" = Attitude). In an early
memo, I noticed that interviewee statements could either be parsed as syllogisms or
enthymemes (Corbett & Connors, 1999). While Saldaña proposes that values coding is a
mechanism by which a person’s ethos may materialize, he does not define ethos, nor does
he put forward an exhaustive formula for determining whether a particular utterance
indicates values, attitudes, or beliefs. Ethos, as a rhetorical construct of one's character
through language, seemed like an appropriate framing for analysis since I was analyzing
faculty members' values based on their own words and actions. In the scope of this study,
one which regards faculty statements as arguments that support their educative ethos, I
found it productive to map the variables of values coding onto the three parts of the
syllogism and enthymeme—a rhetorical syllogism (Table 3.1). This heuristic for
conducting values coding proved helpful for me, and I encourage other researchers to
consider using it.
Table 3.1. Syllogistic values coding

<table>
<thead>
<tr>
<th>Syllogism</th>
<th>Enthymeme</th>
</tr>
</thead>
<tbody>
<tr>
<td>A deductive construction comprising a major premise (Value), minor premise (Attitude), and conclusion (Belief)</td>
<td>An inductive construction where the minor premise is omitted</td>
</tr>
<tr>
<td><strong>Syllogistic Construction:</strong></td>
<td><strong>Enthymematic Construction:</strong></td>
</tr>
<tr>
<td>A (Value) + B (Attitude) = C (Belief)</td>
<td>A (Value) = C (Belief) [because of inferred B (Attitude)]</td>
</tr>
<tr>
<td><strong>Examples relevant to my study:</strong></td>
<td><strong>Examples relevant to my study:</strong></td>
</tr>
<tr>
<td>● &quot;Textbooks need to be well edited (A). Publishers have bountiful resources for copyediting (B), so open textbooks cannot be the same quality (C)&quot;</td>
<td>● &quot;Textbooks need to be well edited (A), [and publishers have bountiful resources for copyediting (B)] so open textbooks cannot be the same quality (C)&quot;</td>
</tr>
<tr>
<td>● &quot;My partner got an offer here (A); I got this job because (B) I was the “trailing spouse” (C).&quot;</td>
<td>● &quot;My partner got an offer here (A); [I got this job because (B)] I was the “trailing spouse” (C).&quot;</td>
</tr>
</tbody>
</table>

After sorting statements through values coding, I analyzed how survey responses were either confirmed or challenged by interview data. Doing so allowed me to code additional values and identity influences from the relationships held between survey and interview statements, statements and those who uttered them, and respondents with other respondents. The analysis step organized data well for second cycle coding, in which I employed Clarke’s (2005) situational analysis technique to map relationships between codes and categories that exist across the interview, survey, and memo data. This process helped me reconcile any abstract moiety categories that might have otherwise emerged.
during later stages of analysis because of how these mapping procedures allowed me to simultaneously "address voice and discourse, texts and the consequential materialities and symbolisms of the nonhuman, the dynamics of historical change, and, last but far from least, power in both its more solid and fluid forms" (Clarke, 2005, xxiii). All meaningful data could be in a conversation at once. Clarke’s appropriation of the grounded theory methodology thus allows researchers to comprehend the contingent social processes that sponsor the exigencies, beliefs, and narratives of a study population in certain situations. In the course of this study, situational analysis targeted the moment in which one's values and sense of self-informed faculty choices to respond to a survey, indicate their plans to not adopt open textbooks, and justify this choice within their greater worldview no matter how contingent or ephemeral this choice may have been (Clarke, 2005, p. 29). This is done by mapping data descriptively along situational, positional, and social lines in the following formats:

- **Situational Maps** that lay out the major human, nonhuman, discursive, and other elements in the research situation of inquiry and provoke analysis of the relations among them

- **Positional maps** that lay out the major positions taken, and not taken, in the data vis-à-vis particular axes of difference, concern, and controversy around issues in the situation of inquiry

- **Social worlds/arenas maps** that lay out the collective actors, key nonhuman elements, and the arena(s) of commitment and discourse within which they are
engaged in ongoing negotiations—meso-level interpretations of the situation

(Clarke, 2005, xxii)

Such an approach to grounded theory honors postmodernist convictions by allowing researchers to generate multiple, contingent theories instead of processing data toward one basic unit of analysis. At the same time, the maps generated by situational analysis allow us to think systematically through the research design, about the effective presentation of emerging connections, and over what future data collection should entail (Clarke, 2005, p.86). In the exploratory study of a population that has otherwise been unaccounted for, I found methodically ideating a variety of possible connections and theories toward future research to be a reasonable place to start.

I first presented the findings of this study under the title, "The Merits of Keeping Closed: Profiles of Faculty Who Purposefully Chose Not to Adopt Open Textbooks," in early October, at the 15th annual Open Education Conference in Niagara Falls, NY. Those who attended my presentation responded favorably to my initial findings which profiled common characteristics of survey participants’ values, observed a common theme of reticence among their positions, and recommended greater empathy toward faculty interests. I have since shared the presentation slide deck with few attendees who acknowledged that the sort of faculty I described had been eluding them. They were looking forward to iterating my recommendations as part of their own approaches to faculty development and relationship building. Since that time, my analysis of data has reached saturation and a more mature theory of educative reticence has emerged in consideration of the forces that mediate those activities which instructors are willing to
disclose openly. Though my study is exploratory, and its findings are descriptive above all else, the presentation seemed to resonate with audience members who support faculty for a living. Attendees who requested copies of my openly licensed slides for their own presentations suggests that the practical application necessary to validate my theory are both immediately approachable and worthwhile.

**Delimitations of this Study**

As already discussed, the Hawthorne effect is present in this study. Also, as is the case with any research based on qualitative methods, the findings covered in the following chapter may not be generalizable to all faculty who chose not to adopt open textbooks. Instead, what they represent is conjecture about the values that may be influencing faculty decisions in just such a situation. The faculty values discerned here may be common and, as a result, any heightened sensitivity to the rational actions of faculty who don't adopt a technological innovation may shape novel hypotheses about faculty development, the modern conditions of education, and our own actions. Validation of these findings will thus need to be sought in future empirical exploration across any range of situations in which someone makes a verifiably informed choice not to do something.

Another prospective limitation is my familiarity with an active contribution to the OTN as a faculty workshop presenter. Since early 2017, I have delivered faculty workshops on behalf of the OTN at member campuses across the United States. As such, I have a vested interest in the results of this research as it both confirms and challenges
my considerations of faculty learning when delivering OTN workshops. In fact, one interviewees had even attended one of my sessions. Important to checking this limitation, however, is my institutional affiliations and the study's emphasis on OTN workshop content, not the speakers. Though both Clemson and Boise State University are members of the OTN, and while my professional role as an educational technology administrator at Boise State situates me in support of OTN-related programming on my campus, my institutional home is not the OTN nor is it the University of Minnesota which houses the organization. First and foremost, I am a full-time staff member and part-time adjunct at Boise State and this is the position that informed the questions, references, and connections I posed to participants throughout the study. Second, participants also came to know me as a part-time doctoral student at Clemson University. Where my association with the OTN could be viewed as a limitation, my familiarity with their processes and the curriculum that this organization delivers through faculty workshops proved invaluable in recognizing points where interviewees misremembered what they did or learned as a result of working with the OTN and those groups (librarians, instructional designers, technologists, etc.) that manage its resources locally.

**Summary**

This chapter identified the ways in which I isolated the population of this study, secured approval for studying this group of faculty, solicited their participation in research, designed survey and interview protocols, and collected data. A rationale for data collection and management was also described. Relevant for future application of
my methodology is the novel, syllogistic strategy that I propose for differentiating values, attitudes, and beliefs during values coding. This method builds on the values coding method defined by Saldaña in that his approach nests observance of values, attitudes, and beliefs all under the blanket concept of values. My strategy proposes that meaningful relationships exist at the level of values, attitudes, and beliefs themselves, and that interplay among these variables should be considered before a more general conversation of values alone. My position is based on the conceptual framework of Chapter Two, in which I suggest that values, attitudes, and beliefs are clearly negotiated in response to a person's identity. Further confirmation of this perspective came from presenting on initial findings at the 2018 Open Education conference and receiving validating feedback about how my observations were lucid, relatable, and, therefore, ready for appropriation by others conducting faculty development. The chapter concluded with a discussion of study delimitations that may assist others in assessing the appropriateness and utility of my findings in Chapter Four.
CHAPTER FOUR
A SITUATIONAL ANALYSIS OF FACULTY (NON)USE

Everyone has the right to freedom of thought, conscience and religion; this right includes freedom to change his religion or belief, and freedom, either alone or in community with others and in public or private, to manifest his religion or belief in teaching, practice, worship and observance.

(“Universal Declaration of Human Rights,” 1948, Article 18)

The work of an instructor and the values motivating her work are nothing if not complex. In this chapter, I outline how I wrangled some of this complexity by adopting an offshoot of the grounded theory method: situational analysis. Developed by a student of Strauss, one of the founders of the grounded theory method, Clarke (2005) positions situational analysis as a means for addressing what she and others refer to as the “postmodern turn”—a broader cultural appreciation of complexity in increasingly global relationships, a new emphasis on the ontological politics of being, and the heterogeneous forms of knowledge acquisition that result beyond mere rationality (p. xxiv–xxv).

Though introduced in previous chapters, this chapter more clearly explicates how a series of ordered and abstract mapping processes characterize situational analysis and “allows researchers to draw together studies of discourse and agency, action and structure, image, text and context, history and the present moment—to analyze complex situations of inquiry broadly conceived” (xxii). Accordingly, I have arranged the presentation of findings to reflect the order in which I conducted each step. First, I present a general overview of data collection via survey and interview instruments, the preparation of that
data for analysis, and the initial themes that emerged among faculty before situational analysis took place. In the latter parts of this chapter, I analyze the maps generated by situational analysis in the order that Clarke recommends: beginning with the relationships of the situation (specifically, considering open textbook adoption and, generally, considering instructional change) in abstract, ordered, and relational terms; moving onto the positions that faculty harbor from a place of declared importance (determined as a result of values coding); and concluding with a process that reconciles the social worlds and arenas that influence faculty behavior in this situation (one that, in its broadest conception, relates to technology adoption).

**Reviewing and further preparing data for situational analysis**

The ten faculty members who participated in interviews with me represented various experiences, institutions, and demographics. A 50/50 split of self-identified men and women participated in interviews. In terms of age, half (n=5) were older than 55, four were between the ages of 35 and 44, and one was under the age of 35. Thus, a clear age gap existed between 45–54 in the population of this study. While a majority (n=4) had taught for over 20 years, the second largest group (n=3) had only taught for 1–5 years. The rest taught between six and fifteen years, meaning that there was a gap in representation among the population for those with 16–20 years of experience. Worth noting for any of these ranges listed—all of which were borrowed from the Babson Survey (Seaman & Seaman, 2017)—is the likelihood that faculty would fall on varying
points in the range. Thus, the interviews offered an opportunity to get a more specific sense of where faculty opinion fell in relation to variables like age and experience.

While the majority had taught face-to-face (n=8) and/or online (n=7), nearly half (n=4) had also taught hybrid/blended courses. Participants represented a broad range of disciplinary categories: Arts and Humanities (n=5), Social Sciences (n=3), Natural Sciences (n=3), Computer and Information Science (n=2), Business Administration (n=2), Education (n=1), Language/Linguistics (n=1), and Engineering (n=1). In fact, the only Babson categories not represented by survey elections were Economics, Law, Mathematics, Philosophy, and Psychology. Half of the faculty were tenured at their institution, and one was in a tenure-track position. The others held roles that would not lead to tenure. Despite variation in seniority and job security, all at least influenced the selection of course materials at their institution (Table 4.1). This capacity of all interviewees to influence textbook choice is necessary for a study that originated from faculty volunteering their intent to not use open textbooks; instructors cannot willfully adopt open textbooks if they cannot influence textbook choice in some direct way.

Similar to the demographic ranges mentioned earlier in this paragraph, any survey-based elections about institution type, teaching/tenure status, instructional modalities, disciplinary affiliations, professional roles, technology relationships, concept awareness/familiarity, intrinsic/extrinsic motivation, and other lines of questioning constrained by Likert or multiple-choice questions were also investigated further during interviews.
Table 4.1. Faculty relationships to course texts (survey)

<table>
<thead>
<tr>
<th>Role in selecting course texts</th>
</tr>
</thead>
<tbody>
<tr>
<td>● I am solely responsible for the selection (n=7)</td>
</tr>
<tr>
<td>● I am a member of a group that makes the selection (n=2)</td>
</tr>
<tr>
<td>● I influence the selection, but do not have decision-making power (n=1)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Types of required texts (22 total selections)</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Textbooks (n=7)</td>
</tr>
<tr>
<td>● Articles/Case studies (n=5)</td>
</tr>
<tr>
<td>● Multimedia (n=4)</td>
</tr>
<tr>
<td>● Datasets (n=2)</td>
</tr>
<tr>
<td>● Academic monographs (n=1)</td>
</tr>
<tr>
<td>● Digital learning system (n=1)</td>
</tr>
<tr>
<td>● Own course text delivery system (n=1)</td>
</tr>
<tr>
<td>● Anthology of music (n=1)</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Types of recommended texts</th>
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</thead>
<tbody>
<tr>
<td>● Textbooks (n=1)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Licenses associated with assigned texts Types of required texts (27 total selections)</th>
</tr>
</thead>
<tbody>
<tr>
<td>● *Copyrighted (n=20)</td>
</tr>
<tr>
<td>○ Copyrighted (n=20)</td>
</tr>
<tr>
<td>○ *Volunteered Other: Private password website (n=1)</td>
</tr>
<tr>
<td>● Public Domain (n=7)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Satisfaction with currently assigned texts</th>
</tr>
</thead>
<tbody>
<tr>
<td>● Extremely satisfied (n=4)</td>
</tr>
<tr>
<td>● Somewhat satisfied (n=5)</td>
</tr>
<tr>
<td>● Neither satisfied nor dissatisfied (n=1)</td>
</tr>
</tbody>
</table>

Though the pre-interview survey proved helpful in identifying some common traits among the group, these similarities did not always hold up when broached during interviews. For instance, nine of the participants self-identified as white on the survey, yet one of these white faculty is also not an American citizen. As such, the cultural dimension of her answers was not accounted for by the survey instrument. Though participants could select as many descriptors as appropriate for identifying their institution type, only eight identified their institution as a “Four-Year” when it applied to all of the interviewees, and more than the one who indicated so on the survey were working at “Liberal Arts” institutions.
When surveyed about the types of required materials in their classes, participants identified 8 sources of educational content and were either extremely satisfied (n=4), somewhat satisfied (n=5), or neutral (n=1) about these texts. In interviews, however, many of these required texts were regarded on comparable terms to the one respondent who indicated that a textbook was merely recommended. Simply, not all required materials were required. That said, faculty found more factors important than not when selecting materials for their courses (Figure 4.1). Even before transitioning this data from the surveys to interviews, conflict arose in faculty understanding of the licenses associated with the materials they assigned. 22 selections of course materials were made by ten faculty members participating in this study, meaning that many if not all are in the habit of assigning more than one type of educational resource. But when it came to identifying the licenses associated with those 22 texts, faculty selected an additional 5 licenses. Considering these materials were either identified as “Copyrighted” (n=20) or in the “Public Domain,” and that these license types are not compatible, this data on its own would have been insufficient and would necessitate follow-up with these faculty about the specific materials that they had assigned to students. Such survey-based confusion was not the only factor that supported the importance of interviewing these faculty, however.
Figure 4.1. Important factors for selecting course materials. This figure accounts for the most/least important qualities of course materials as determined by this study’s faculty and based on their pre-interview survey responses.

In preparation for each interview, I consulted the degrees to which respondents were aware of and valued issues relevant to open textbooks (information that they would have learned during the OTN workshop) and modified interview scripts to reflect the
awareness and that value they indicated in their surveys. Familiarity with Copyright, Public Domain, and Creative Commons varied among respondents and in this order (most familiar to least). That they were least familiar with Creative Commons is worth noting since a substantial portion of the OTN workshop focuses on what these open licenses are and how they function. Further, as was found in interviews, faculty understanding of (or even concern for) copyright and public domain is questionable. Faculty indicated that copying, using, and sharing open content were the most valuable activities enabled by open licensing. Editing was identified as one of the least valuable activities and this finding is consistent with the literature (Coleman-Prisco, 2017). But, interestingly, copying was also identified as one of the least valuable activities. With the additional context granted by interviews with these faculty, the under/valuing of these concepts can (and will) be explained in ways that otherwise could not be determined by this survey (and others like it).

Though perhaps unsurprising since the OTN workshop focuses on open textbooks specifically and not OER in general, the majority of faculty were unfamiliar (n=6) with OER, and even more had not used it (n=8), even though this question featured the Hewlett definition for OER (as it does in the Babson survey) for those of the former position and, as was found in interviews, was not always the case for the members of the latter group. Unique to this survey was a focus on what motivated faculty to participate in the OTN workshop and its related activities. While the majority of faculty had written and published OTL reviews, familiarity with open textbooks varied with only three faculty members feeling very or extremely familiar with this type of educational
resource. The majority (n=7) were demurer about their familiarity, claiming only to harbor slight or moderate familiarity. Since nearly as many of those faculty who reviewed open textbooks claimed a lack of familiarity with them, the premise that faculty are comfortable reviewing open textbooks after the OTN workshop became just one more thread worth investigating.

My process for transcribing interview recordings spanned multiple months and made use of a verbatim-style approach. Though time-consuming, verbatim transcriptions preserve not just the content of interviewees’ statements of value but also the degree of clarity, confidence, or restraint that they may have exhibited while volunteering this information. Accordingly, I did not opt for true verbatim transcription because it would broaden the scope beyond the interview itself (e.g., including environmental interruptions, overemphasizing non-verbal cues, and fixating on technology-based communication issues—all of which fall out of the scope of this study). Nor did I pursue intelligent verbatim (or some more edited form) of transcription because doing so could at best soften and at worse misrepresent both what interviewees said and how they said it. Once transcribed, I annotated statements as syllogistic/enthymemematic statements to assist with their values coding. These annotations also served as a platform for informal memoing. Because NVivo natively aggregates annotations, I was able to effortlessly incorporate their content into the larger analytical memos that I generated while coding and analyzing. Because “inadequate memoing” is a pronounced problem in qualitative research projects, I borrowed a suggestion from Clarke (2005) that “scribbled notes are always better than nothing, and thoughtful memos on the computer are intellectual capital
in the bank” (p. 84). Accordingly, the memos generated during my study occupied a few
different physical and digital platforms during their development but inevitably ended up
in my NVivo project. From a practical standpoint, this allowed me to note connections
between codes and categories that emerged regardless of access to NVivo. Since, as
Clarke claims, codes are provisional at best (p. 84), I found a less-formal approach to
coding and memoing to not only better accommodate my personal and professional
responsibilities but also help me interrogate the fixedness of connections by subjecting
them to changes in time and environment. I will now briefly review those connections
that held up during values coding.

**The Situational Values of Open Textbook Nonusers**

Because faculty workloads and schedules so often diverge from that of me and
my staff colleagues, I commonly encounter suspicion about or even frustration from non-
faculty about how instructors seem to spend their time. If an instructor can’t meet with us
during a standard workday, RSVP for a workshop that they end up not attending, forego a
policy or technique that we have informed them about, or, relatedly, make instructional
choices that seem to serve their convenience over their students’ experiences, I am
accustomed to hearing accusations lobbied about how said faculty do not care about their
students or our efforts to support all learners (including the teachers). After transcribing
and coding over ten hours of interviews with faculty who claimed to have no interest in a
specific technology and, as a result, the student benefits related to its use, I am confident
when I claim that there is more to it than whether or not faculty members care. The
values, attitudes, and beliefs shared by those I interviewed paint a picture of not just how much they care about their students’ learning experiences but also how acting on those values publically might compromise them professionally in the future (if it hasn’t already). In their values, I also found a portrait of myself as well as many of the educators who mentored me.

Service.

One theme that emerged early on was the degree to which many of these faculty invest time and energy into creating educational opportunities for their students outside of class meetings. Such investments ranged from more common fair such as heading student clubs and collaborating with students on research to taking on additional advisees when advisors leave an institution, establishing entrepreneurial connections between students and the community, or even developing digital learning environments that may or may not be open. While one instructor dismissed her efforts to help students as little more than “I don’t have a life” (DE), others presented more deliberate reasons for prioritizing the experiences of their students. For one instructor, her academic interests in entrepreneurialism and experimental business models motivates her to help students bridge the gap between her classroom and their careers. She finds practical importance in the likelihood that students, especially the art students she teaches, will be forced into an entrepreneurial position:

So most of the students, if we look at numbers, about 60 percent of the students that come out of school are going to behave in some entrepreneurial manner.
Largely what that means is they're going to go work at a coffee shop and have a side gig. And that's fine. But we have to prepare them for that. (GH)

This instructor recently began developing her own open materials with colleagues because the content that they need to prepare students for such fates does not exist as completely as they would like. Further, she recognizes the ways in which open source content may aid industry professionals and leaders alike.

When we teach coding, we deal with open source things, right? It's free software that's used. So you know coding platforms that are free, using repositories that are free, doing things that are all free for the students… [I]t doesn't make sense to let them figure it out once they leave. We should be using them [open pieces of content] now. (GH)

Additionally, by making more reliable resources available for open use by students during and after their college careers, this particular instructor finds other teachable moments in how “students are getting their resources online, in different places—even finding some of their textbooks they should be, according to the professors, paying for themselves. So, we're trying to point them in directions of the places that are completely legal” (GH). Under this conviction, she and her colleagues have been assembling instructional media for educational experiences that do not necessarily resemble what would commonly be found in a classroom and, ideally,

create more of an educational culture that they're a part of rather than feeling like, ‘OK, now is my learning time because I'm sitting down in front of my computer
or my book. But when I leave this place, it will no longer be learning time, so I don't have to worry about that.’ (GH)

This instructor and her colleagues are not the only ones who cared about developing lifelong learning strategies for students, however.

**Relevance.**

One instructor developed and has actively maintained her own learning management system since the nineties, replete with content (e.g., eTexts, instructional media, quiz banks, study guides, etc.) that are comparable to what one may find in modern publisher software. Her initial goal was to teach physics concepts in ways that were relatable and immediately accessible to students. What has since resulted is a variety of academic projects that are made possible through students being able to access free, media-rich learning environments. In one example, she recalled a student who approached her after a lesson on synesthesia:

I [had told the class], when you have synesthesia, you hear something and see a color. Or someone sees a letter as a color—"A," "B." And then one lady came up to me after class and says, "You know, I was wondering why the class did not understand this. And I discovered, like an hour ago, that I am different; I thought everyone had synesthesia." I said, "That's a wonderful story." So she wrote that up as a creative writing major, and we published that story. That’s how you can discover something in physics, you see? (BC)
Though her software system is not technically open, it is free for her students and the tool itself (both software and content) have sponsored learning opportunities for everyone from students to her children to colleagues across disciplines. Another instructor who is perpetually dissatisfied with how publisher textbooks teach the process of solving problems in physics has supplemented readings with her own ancillary study materials. Recognizing that students would gravitate toward looking up answers online instead of trying to solve problems themselves, she believes that the difficulty of the problem is not one of content but, rather, the hours it would take students to hunt for an answer:

“So basically what I had to do to change—to counter that—is basically give away the answer. OK? In the old days, I would never give away the answer. But, now I basically write detailed solutions or instructions on how to solve all the homework problems and make them available to the students, so they don't waste any time ... trying to look for the answer on the web. (CD)

For her, this effort comes with knowing that, “Well, the process is much more important than finding the right answer” (CD). Yet, the values of these instructors and their related activities in developing and delivering original educational content are hardly unique.

One instructor is able to modify the copyrighted content in the homework platform that she uses to teach math classes for business majors because the publisher has implemented this functionality. Meanwhile, others who teach classes that are more aligned with culture and current events selectively curate collections of videos, articles, and other content that they find online or through the library to supplement the aging
examples published in textbooks. Then there are those faculty members who found importance in appealing to sociocultural interests of their students:

One thing I really am trying to do for next year is diversify the Music Histories survey [that I teach], even though the part that I teach goes from antiquity to the middle of the 18th Century, through the Baroque. So, you can't diversify that too far, but I'm looking to see what I can do. Especially after Charlottesville and so on. (FG)

For the instructor above, her cultural concerns are also practical when the most valuable textbooks are those that may serve as long-term references for students and so supplemental content is necessary to increase the lasting relevance of her course materials. Perhaps it should come as no surprise that all instructors participated in such activities of iterating and supplementing the diversity of instructional content for courses and, as a result, none were particularly enthusiastic about textbooks (open or otherwise).

Choice.

Those who were more satisfied with the commercial textbooks in their classes appreciated the value that accompanying software systems seemed to bring to their students. From an affordability standpoint, they appreciated how these digital solutions were cheaper than those that used a print textbook, the integration of these eText systems with their institution’s learning management systems, and the individualized assessments that the software generated for students. These same instructors, however, were unaware of student perceptions about the individualized, adaptive assessments and guidance
available in these commercial software platforms. In any case, the content and experience of reading the associated textbook were secondary. Also, importantly, their decisions to use these commercial platforms were usually influenced by others. For one, despite the autonomy that she was given in redeveloping a course, there were a number of factors dissuading her from doing so:

I had inherited a really decent course from my predecessor, who retired when I took over this class three years ago. I probably updated at least half of it in terms of what [students] were doing, but it was a really solid base and she did not use any textbooks in the course. She used the software company that we— is the industry juggernaut, we call it, is [product name omitted]. (HI)

Besides having a curriculum to run off of and the tutorials provided by the “industry juggernaut” of her field, building the class around a standard, institution-licensed software system allows her to not use a textbook in that course and addresses her concerns about how much students would have to pay for textbooks or software in her field.

In the context of faculty like HI, who do not have the job security and departmental authority of her tenure or tenure-track colleagues, another instructor further validates the choice of contingent faculty to adopt status quo options with the acknowledgment that,

I've got the privileges of tenure. And that includes, that requires, a certain responsibility. But, with the way the growing tendency to use non-tenured track
faculty, especially if they're part-time, I think they often need to be given the
grace of “teach this textbook.” (FG)

When such a luxury is not available, as it was for EF when she was a new faculty
member vetting homework systems as part of a committee, there are other ways of
strategically narrowing available choices:

I really relied on different faculty; I'd talk to them about which system they used
and why they liked it. Because for that first year, I used [product name omitted]
so I kind of knew what I did and didn't like about it. So I learned a little bit about
the digital learning system. But I even spoke with faculty outside of our
university, who were at a conference that I went to for active learning. (EF)

What the instructor above references as a “big mission” of hers was soliciting the
perspectives of others in her discipline who, like her, value pedagogical concepts like
active learning. It did not matter that they worked for different institutions, their shared
pedagogical affinities that brought them to that conference were more meaningful in the
context of making recommendations. Naturally, all of the faculty that I interviewed
harbored values that spanned departments, institutions, industries, and disciplines, that,
inevitably, manifested in the pedagogical and philosophical underpinnings of their
instruction. What proved most important for my research was trying to discern those
moments when these values emerge in how of educative—thoughtfully formed—acts, not
just in what instructors said was important to them.
**Action.**

When asked about their teaching philosophies, faculty articulated singular visions for the sort of experiences that they want their students to have. In some cases, faculty wanted to pass the skills that they value on to their students (AB, GH, HI, JK). Others sought to refashion their subject matter beyond a specialized discipline and make it meaningful for any student (BC, DE, IJ). And others still just wanted students to learn how capable they actually are (CD, EF, FG). Accordingly, the first group often described the ways in which they facilitate hands-on learning for students. They believe students learn best by doing. The second group of faculty spoke endearingly about how various life experiences have allowed them to situate instruction in contexts that were more immediately relevant to students than more standard disciplinary examples. For them, effective learning happens when they make a connection with students and their interests. Lastly, the third group sought to inspire students by presenting challenges that would scaffold techniques for overcoming obstacles. For these instructors, the journey into knowledge was more important than the outcome. Because these sort of student/teacher relationships operated in the realm of philosophical positions, however, not all actions fit the intentions of speakers.

One member of the learn-by-doing group sees more valuable discussions taking place in her online classes than in the in-person versions:

Truthfully though, except with a couple of just really exceptional teachers and exceptional students, I find the forums on the online version to be much more rich. They have more time to think about what they're going to say. They know
they've got to at least say something. They have to—it has to be at least this long—you know, it has some requirements to it. And so the sort of richness of what it is that they have to think about and come up with is much greater, I think, online than it is face-to-face. But it's not interactive in the same kind of way. (AB)

She is cognizant of the differences between the two forums of discussion and, yet, seems to concede that little can be done to reconcile the issues that each has.

A member of the learn-through-my-experience cohort shared concerns about students who were less likely to share their own experiences:

I find that my hockey players are very outspoken, I love them because they add a lot to the class, and, you know, the other students, the international students are very, very, usually meek and mild and quiet. And they'll come up to you after class with their question. Well, that would have been a great question to ask in class, so everybody could hear. You know, but, you know, so—And I find the students up here are very quiet. They don't ask a lot of questions. (DE)

Even the process-over-product faculty struggle in situations where the conviction of students so work hardest in pursuit of specific grades or validation distracts them from learning the instructor considers to be the most important content or techniques of the class:

I taught a course before in which I had asked the students to write an essay. This was a physics reports kind of course, and every year I would, you know, give the same topic, and ask students to read a certain article and then write their opinions about whether—well, in my case, I asked them whether they thought quantum
mechanics and special relativity were compatible with each other. And there's no right answer. And I wanted each of them to come up with their own argument and own opinion on something. But they would always come to me like a few days before the essays were due and wanted to quiz me and, like, get me to tell them what the right answer was. And it was so annoying. (CD)

While only some faculty volunteered their frustration with students in certain contexts, those who did also share a similar mindset: teaching and learning would be more effective if students engaged with me and my instruction as intended. As an educator who identifies with all of the philosophies put forward by my interviewees, I too must concede that I hold these thoughts when students do not perform as expected. And while it is fair for me and others to focus on the student/teacher relationship to figure out what went wrong, there are myriad other mediating forces at play.

Technology.

While instructional technology like LMSs, textbooks, and so on may help organize the lessons of an instructor for clarity and emphasis, multiple faculty that I interviewed expressed uncertainty about if and how students used these resources. One, in the wake of her OTN workshop, recognized that expensive textbooks could force students to be more cunning in how they secured access to required course materials but was also willing to postulate, “I don't know if they care that much about which textbook somebody is using. I'm being honest because I don't think they read it” (JK). This
position derives from observing different student outcomes when she evaluates student understanding of both in-class and in-text content:

I would say the [textbook] questions on exams don't score as highly as what they got from class, and the same is true in my upper division course. Whenever there's an exam and there's a question on the reading more discreetly—and it's not even a discrete passage in the readings just like “what’s the argument?”—then they don't get those. But they get the ones from class. (JK)

As a result, this specific instructor found herself supporting the choices of students over supporting textbook content:

I guess it's kind of relative deprivation. I mean, it's like what I think they are achieving versus like why they're capable of achieving and if they would only read that and obviously they would get so much more out of the class. But what can I do? (JK)

While she notes that others utilize strategies like reading quizzes to provoke student engagement with course materials, she would rather regard her students as adults who are capable of making their own choices. “[I]f they don't want to do the reading then that's on them, you know like they have to learn how to make good choices in life” (JK). While this perspective is consistent with her affinity for learning through experience, it is also one that suggests that she and her students find limited instructional support from her course materials and the strategies of her colleagues. To make concessions to either would suggest that the issue is her instruction, not the tools and techniques that she chooses to employ. As I have discussed, technological proficiencies varied
dramatically—ranging from adopting others’ technology full stop to the full stack development of digital learning platforms—among this group. Yet, all instructors considered the instructional support units of their institution to be helpful resources (even if they harbored confusion about which department did what).

**Support.**

The founding context of this study is that faculty were willing to undergo voluntary professional development and, in most cases, complete the educative task of reviewing a textbook for a modest incentive. That these faculty did not intend to adopt open textbooks does not diminish the fact that they were aware that faculty development opportunities like the OTN workshop were available on their campus. Indeed, many of my interviewees either claimed to be regulars or proved to be well-informed when it came to faculty training. For instance, I encountered no pregnant pauses when asking those who taught online classes if they were teaching synchronous or asynchronous classes. Often, unprompted, faculty would go on to describe the design of their courses’ online learning experiences in a level of detail that showed an informed perspective of instructional design as well as ownership over how students were meant to navigate online instruction. Other interviewees recognized the ways in which attending instructional training empowered their teaching. The sole tenure-track professor recounted the range of topics she has studied with her local teaching excellence department:
So there is one group, it's called CTE—Center for Teaching Excellence. They constantly hold workshops and are open to faculty from all colleges. Sometimes they're specialized workshops for College of Arts and Sciences, but they are never specialized, necessarily, for say the teaching of language or something like that… There are usually broader topics such as plagiarism, such as how to deal with international students, such as what is a good assessment in the classroom.

Beyond attendance being relevant to her institution’s tenure process, she has found additional value in the multidisciplinary composition of those who attend, “[Y]ou learn from all possible disciplines and then you think about “how can I apply this to my specific discipline?” (IJ). As other instructors who teach online also noted, an online education department is available at IJ’s institution where specialists may help “you either convert the content to an online class, or hybrid class, or you can also just learn about what is online teaching and what is hybrid teaching” (IJ). Her practiced familiarity with the work of these service units is further evidenced in how “were very instrumental at helping me develop my online class and understanding how to use open educational resources and copyright” (IJ). She knows and appreciates working with these groups because they have helped her produce outcomes that she finds important.

The last group that IJ recognized was the library and its librarian who coordinated the OTN workshop. While most interviewees generally had some familiarity with the instructional support staff at their campuses, few had as much of a relationship as this particular faculty member. The most striking evidence of this came from a place of
confusion among multiple interviewees regarding who organized the OTN workshop at their campus. While most credited their libraries with facilitating the event, other perspectives strayed far enough to consider the session as nothing more than a vendor information session than university-sponsored training. One instructor poignantly presented her surprise about the event being an optional faculty development opportunity: “I never got the impression I was being trained in anything” (JK). That faculty could harbor such positions seems even more reasonable when noting that only one faculty member received any sort of personalized follow-up from local OTN coordinators after completing the workshop.

**Follow-up.**

For the one interviewee who has received regular contact from her library, she has continued to appreciate their efforts to engage her even if she can seldom contribute to the local community:

They do send me all the notices of the open textbook meetings that they have. And they do host, you know, regular meetings of faculty that are interested in developing open textbook material. It's just that, for some reason they always sort of schedule their meetings during my lecture times. So I can never attend them. And last semester, I finally found some time where I could attend, and I went, and nobody else showed up. (CD)

Evident in her statement is that she is aware that regular meetings are taking place, other instructors have been participating, and she feels included from receiving the
communications. While the experience of being the only faculty attendee after not being able to join others in prior meetings may deter future participation in these meetings, there is a reason to suspect ongoing engagement from this instructor thanks to her ability to clearly identify the person organizing all programming related to OER on campus. For others, the extent of their interactions regarding the OTN workshop came by way of automated OTN emails about completing a review, direct emails to participate in this very study, or impersonal emails to a list of workshop attendees. The impression I got from faculty is not that they feel abandoned in any of these circumstances but, rather, that they are uncommitted to ongoing engagement with whoever organized the OTN workshop. Simply, there are more important things for faculty to worry about than whether they have an OER ally on campus.

**Oversight.**

One of the most pronounced themes that emerged during values coding is the role of oversight in the lives of faculty. Matters of quality assurance for course materials, respect for disciplinary standards, ratings among student evaluations, administration of an institution’s priorities, and protection of one’s intellectual property were just some of the many loci that emerged where faculty expected, managed, or avoided oversight. Though not surprising, some faculty still held concerns about the quality of open textbooks despite efforts by the OTN to overtly offset such apprehensions through data-driven workshop talking points and peer-review processes for reviewing textbooks. One instructor felt that the latter strategy was problematic because it highlighted a “legitimacy
gap” between open and commercial textbooks: “I think another thing that is interesting is that open textbooks are reliant on reviews and other textbooks are not—like textbooks from the publishers” (JK). A related concern that this same instructor had for both the quality of open textbooks as well as issues in oversight was whether or not students actually read open textbooks. She reasoned, “if they don't buy [textbooks] anyway and they don't read them anyway… it doesn't matter if they’re open or not” (JK). That said, she admitted that she would use the OTL if she felt like the content was appropriate for her, recognizing that even though she prefers print materials, “I would just print out the whole open textbook myself” (JK).

Of concern for others were the ways in which the texts commonly used in a discipline convey knowledge. As one instructor described, [A]ny discipline goes through a series of, you know, paradigm shifts and so forth and so on. Many of the (and this is true of the high school [history] textbooks as well too) they're really wedded to political history, so it's basically, “Who was the president? Who was in the cabinets? What wars were fought? Was there an economic downturn or an upturn?” You know, sort of that kind of format—and I find that to be pretty deadening. And, fortunately, now many of the better textbooks don't do that anymore. They've found other ways of integrating the same material. But they might do it through a biography. They might be doing it through other kinds of ways that actually pull the students into the material in a more engaged kind of way rather than, you know, giving them a series of political facts that pretty much would put anybody to sleep… I thought the people that
would be writing these open source textbooks would be more oriented toward the sort of like "OK here's a way we can get some new ideas in there" and, instead, it was like they were 10–15 years behind. So the stuff I read, and, I mean, there were the ones I looked at generally were written—each chapter was written by a different author. There were chapters that were quite well written, but the overall package was really disappointing. (AB)

A sentiment shared by this and other faculty members was again indicative of their shared lack of enthusiasm for textbooks. Given the introduction to open textbooks that they received—where authors and users were able to customize content openly in ways that they traditionally could not—the traditional approach that she observed for textbook form and function was disappointing. What was underwhelming for her and others was the lack of investment by those overseeing the production of open textbooks to ensure that they were as transformative in design and content as they were in promoting access and use through open licensing.

Finally, general concerns regarding institutional oversight were apparent in areas related to assessing teaching effectiveness, rewarding faculty behavior, and recognizing faculty scholarship preoccupied many of the interviewees. Multiple interviewees tended to have concerns about how feasible work with open textbooks could be for other faculty:

Promotion, tenure, merit pay, whatever. I mean I think I'm in a place where I can argue that those sorts of things [open textbooks] should be counted. But it's where they're not. Sometimes the—you know, implicitly being told that you have to create open source materials, or you have to take someone else's materials and
adapt to them to your use because Creative Commons allows that. I mean at some point you have to question how many more demands can be put on us.

Further complicating matters were the perceptions of disconnect that existed between what faculty felt they offered their institutions and what administrators expected them to do. In this context, suspicions about administrative support of open textbooks arose:

[Y]ou know administration, obviously, they're going to support all this because it's, it sounds good because it's cheaper for students. But in all reality, they don't have a clue as to the time that goes into some of those things. They don't know. They don't care. They just think, “Oh, this sounds great! Yeah, let's adopt [open textbooks] to save money—so our students can save money.” It's like, “Yeah, right.” They don't, they don't know anything about it—the administration doesn't. They are words only, no action.

Without assurances that meaningful oversight exists in the areas mentioned, faculty struggled to find the motivation that would be necessary to explore open textbooks on their own terms. The rewards they could identify were simply not worth the investment. This is not to say, however, that these faculty did nothing in response to the OTN workshop, nor that they are not invested in tackling the same social problems that the OTN attempts to address with open textbook adoptions. Instead, as generally described so far, these instructors were finding more idiosyncratic strategies for shepherding student engagement with valuable educational content. They are just not always doing it in immediately recognizable ways.
Transdisciplinarity.

While I may have only interviewed ten faculty, the broad range of experiences that the group harbored proved instrumental in helping me understand their motivating values. The majority of them navigated a series of disparate disciplines and industries en route to their current roles. For those who feel valued by others at their institution, they more openly celebrate professional paths that position them as unique and were clearly defined in the wake of pursuing their unique interests. For those struggling with greater insecurity about their institutional wellbeing, they were more inclined to check their feelings about their professional path by rationalizing their fate as the product of spousal hires, the appeal of a faculty schedule, the kindness of others, and so on. When pressed, members of both groups drew from their transdisciplinary paths to validate the motives that they harbor as educators. For some, it was that they had mentors (regardless of discipline) who invested in them the same way they now invest in their own students. As one interviewee recalled:

[When I was up for tenure in 1984, luckily, there was—I had a couple of papers I published on my own, and there was a chemistry professor that worked with me and I published two papers with him [even though I was another department’s] chair. I was able to get my tenure, and I feel like it's payback time. Now that I'm a full professor, I am publishing with the ladies in the Music Department. I published with an environmental studies professor. I published with the flute player at Greensboro—a sister school—a couple of papers…]
to payback and help the younger faculty get publications—co-authorship with me—because a person was generous when I got my tenure.

The educative acts of another academic inspired her to adopt similar behavior in relation to her junior colleagues.

For others, it was a recognition that working beyond one’s disciplinary home can net additional perspectives that inform their practice and scholarship. For instance, one of the non-tenure-track instructors tempered the value of her professional path by suggesting that others might consider it “very interesting” in a skeptical or even pejorative sense while also recognizing that her transdisciplinary pursuit of interests is what helped her establish her current role:

Well, I've taken a very interesting route to arrive here some might say because I have three different degrees in three different, I would call them domain's if you will. My first degree is in engineering from Columbia University up in New York City. I did environmental civil engineering there. But I knew I didn't want to be a civil engineer. While I was in the program, I was sort of trapped; I couldn't transfer to the college because they have separate administrations and very few engineers are let out of engineering school and into the college. They just don't do that, there. So I just stuck it out. Made it work and you know finished the degree. I used to joke, "D is for diploma." I probably shouldn't say that on the record, but—I always think about my past. Like I've struggled as a student and I've done
really—I've also done really well, but when I struggled it was because I did not like what I was learning. It wasn't interesting to me. (Hi)

Her interests lead her to pursue a Master's of Science degree in Geophysics, brief employment with an environmental consulting firm, a stint as a bartender as she figured out next steps, and eventually a Ph.D. in Parks, Recreation, and Tourism. Even that terminal degree, however, deviated from norms as she focused her coursework primarily on statistics and geographic information systems. Looking back on these experiences, she’s grateful for her nontraditional path through higher education:

I have, like, social engineering and physical-mathematical science in my background and people ask me when they hear about my background, they're Like, "Ok. Come on. Where were you going with this?" But it turned out that I now get to teach these amazing GIS classes for students who come from diverse backgrounds of Social Sciences, Physical and Mathematical Sciences, and engineering; and they're all in my class. (HI)

Her pursuit of interests thus allows her to connect with the interests of her students across disciplinary lines.

HI is not the only faculty member I spoke with who pursued a meandering student and professional path across states, industries, disciplines, and discourses to arrive at a place of self-fulfillment. While she had one of the least certain professional standings of those faculty I interviewed (her contract was running up soon), she found pleasure in teaching the classes she could and having the departmental trust and autonomy necessary to design such courses on her terms. For the faculty who followed the most predictable
paths through college and their career, their navigation of culturally diverse situations shaped their expectations for instructional practice among the values of the people, experiences, and arts of other (sometimes foreign) places. For instance, one such faculty member was able to connect her experience as a student in Japan with her expectations for textbooks in the United States:

[I]n Japan, where I got my undergraduate education, we never had these 1,000-page textbooks or something like that. We would have like maybe a 200-page textbook for electrodynamics; another 200-page textbook for like, you know, mechanics; another 200-page textbook for quantum mechanics or something like that. They were all separate, and each one of them was only like $10 or $20 dollars—not that expensive. You never had to spend like $300 dollars for this 1,000-page volume. (CD)

For this instructor, her discursive understanding of textbooks originates in Japan. In turn, we might never expect her to appreciate the role of and expectations for textbooks in American education in the same way as those educators whose expectations are colored solely by their teaching and learning in the United States. After all, she has an alluring, logical alternative in mind for course materials and this is thanks, in part, to her unique experiences as a learner.

For every positive statement that interviewees made regarding the exceptional qualities about their past experiences, these faculty were also quick to qualify the unexpected paths they have taken in their careers. For some, it was mentioning how tenure heavily weighs traditional publications and that even in cases where the Boyer
model is considered as part of the tenure process, “the problem is when the faculty vote, they sometimes don't have the wisdom to vote for the people that adhere to the Boyer model. They vote for the person that has the hardcore publications” (BC). For others, their transdisciplinary values led to skirmishes with faculty and even advisors who harbored competing mindsets about disciplines, discourses, and academic work:

[M]y chair was an art historian and he was very helpful because he was very kind of Germanic in his ability to streamline everything to a fault. And then everybody else was very different, kind of all over the university: English, graphic design, entrepreneurialism, social practice. So it made for fun conversations because nobody was ever on the same side. So the fights kind of became brawls at times. But I survived. So it's all good. (GH)

Given the strength of attitudes, beliefs, and values that accompanied the many boundary crossings that faculty shared with me, I began to speculate that the situation was far broader than what makes one’s values (in)compatible with open textbooks specifically. Instead, it increasingly appeared that an instructor’s navigation of a potentially educative situation—one that would incite one’s own critical practice as well as inform others’—was shaped by a multitude of relationships with living and nonliving factors alike. In other words, the prospect of instructional change, in general, was ripe for situational analysis.
Mapping Educative Acts Among Instructional Change

Taken alongside the overlapping values of faculty outlined in the last section of this chapter, I found compelling connections between the stories of those I interviewed and my own experiences as I had presented them in the positionality statement and questionnaire answers that I provided in Chapter One. Perhaps many of the convictions that I uncovered are common among those of us who work in postsecondary education. If there is a relationship between our values and those of professionals in other levels of education, however, I do not have the requisite experience to say so. For the next analytical step, however, I found myself well positioned to map resonating situations in accordance with the expectations defined by Clarke (2005). She advises (emphasis hers), “Researchers should use their own experiences of doing the research as data for making these maps” (p. 85). And so the insights gleaned from values coding and my awareness of my own values in education structured ensuing processes of systematically “articulating the elements in the situation and examining relations among them” (Clarke, 2005, p.86).

As noted already, the findings I uncovered during values coding made a compelling argument for me to broaden the scope of analysis beyond open textbooks and to, instead, consider any situation of potential instructional change that a faculty member might encounter. In order to account for the human (individuals, groups, organizations, institutions, subcultures, etc.) and nonhuman actors/actants that “structurally condition interactions within the situation through their specific agencies, properties, and requirements,” I produced an abstract situational map (Clarke, 2005, p. 87). This map exhibited a “messy/working” quality as I first considered the human relationships and
their conditions within the situation as presented by the faculty I surveyed and interviewed. Next, I took note of the non-human relationships present in their situations and the factors that influence them. Eventually, I settled on the variables featured in figure 4.2 but not before validating these choices in an ordered breakdown of elements influencing the situation (Table 4.2).

![Diagram](image)

**Figure 4.2.** Finalized abstract situational map. This figure shows the unordered human and non-human actants comprising situations in which faculty consider an instructional change.

The process of ordering abstract situational map elements assisted me in elaborating on some and testing connections between others. I found that these connections fell into one of three categories of influence: direct, indirect, and contested. Under the direct influence of the *Self*, one’s identities as a teacher, scholar, student, and
employee were compounded while also recognizing the capacity of an educator to carry learning practices and professional experiences onward in their teaching and scholarship. Based on the faculty I interviewed, the authorities supervising their work and professional choices were just as likely to be a boss as a significant other. Similarly, colleagues ranged from the predictable interdisciplinary and interinstitutional scholars to the more radical positioning of their students and children as peers. The instructional support staff that faculty interfaced with regularly fell into commonly occurring categories across institutions: librarians, instructional technologists, instructional designers, and online education specialists. Past and present institutional leaders alike may have influenced a faculty member’s navigation of instructional change. Lastly, in terms of direct human elements/actants, authors and/or experts in one’s area of study could play an influential role over the content, networking, and collaborations she chose to take on. The technology that is available to an instructor seemed to be the most apparent non-human actant in the situation. In some cases, these might have been technologies that were supported by her institution. In others, it could have been that her technological proficiencies allowed her to set out on her own and find more idiosyncratic solutions to instructional problems. More abstract technologically, but no less important to the situation was the interplay of intellectual property (one’s own or others’) with different forms of licensing and use.
Table 4.2. Ordered Abstract Situational Map

<table>
<thead>
<tr>
<th>Direct Human Elements/Actors</th>
<th>Non-Human Elements/Actants</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Self</td>
<td>• Available Technology</td>
</tr>
<tr>
<td>○ As a teacher</td>
<td>○ Learning management</td>
</tr>
<tr>
<td>○ As a scholar</td>
<td>system</td>
</tr>
<tr>
<td>○ As a current/former</td>
<td>■ Institutional</td>
</tr>
<tr>
<td>student</td>
<td>■ Unsupported</td>
</tr>
<tr>
<td>○ As a current/former</td>
<td>○ Current Course</td>
</tr>
<tr>
<td>employee</td>
<td>Materials</td>
</tr>
<tr>
<td>• Supervisor(s)</td>
<td>■ Old</td>
</tr>
<tr>
<td>○ Boss(es)</td>
<td>■ New</td>
</tr>
<tr>
<td>○ Significant other</td>
<td>○ Textbooks</td>
</tr>
<tr>
<td>• Colleague(s)</td>
<td>■ Print</td>
</tr>
<tr>
<td>○ Scholars within</td>
<td>■ Digital</td>
</tr>
<tr>
<td>discipline</td>
<td>■ Open</td>
</tr>
<tr>
<td>○ Scholars outside</td>
<td>■ Commercial</td>
</tr>
<tr>
<td>discipline</td>
<td>○ Homework Software</td>
</tr>
<tr>
<td>○ Scholars at other</td>
<td>■ Publisher</td>
</tr>
<tr>
<td>institutions</td>
<td>■ Homebrew</td>
</tr>
<tr>
<td>○ Students</td>
<td>○ Ancillary Materials</td>
</tr>
<tr>
<td>○ Children</td>
<td>■ Quiz Banks</td>
</tr>
<tr>
<td>• Instructional Support</td>
<td>■ Study Guides</td>
</tr>
<tr>
<td>Staff</td>
<td>■ Slide Decks</td>
</tr>
<tr>
<td>○ Librarians</td>
<td>○ Library Resources</td>
</tr>
<tr>
<td>○ Instructional</td>
<td>■ Articles</td>
</tr>
<tr>
<td>Technologists</td>
<td>■ eTexts</td>
</tr>
<tr>
<td>○ Instructional</td>
<td>■ Reserves</td>
</tr>
<tr>
<td>Designers</td>
<td>○ Intellectual Property</td>
</tr>
<tr>
<td>○ Online Education</td>
<td>○ Copyright</td>
</tr>
<tr>
<td>Specialists</td>
<td>○ Fair Use</td>
</tr>
<tr>
<td>• Institutional Leaders</td>
<td>○ Creative Commons</td>
</tr>
<tr>
<td>○ At her current</td>
<td>○ Public Domain</td>
</tr>
<tr>
<td>institution</td>
<td></td>
</tr>
<tr>
<td>○ At other institutions</td>
<td></td>
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</tbody>
</table>
As for the more indirect influences on the situation at hand, the human

<table>
<thead>
<tr>
<th>Indirect Human Elements/Actors</th>
<th>Implicated/Silent Actors/Actants</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Student Clubs</td>
<td>• Institutional Reward Structure</td>
</tr>
<tr>
<td>• Student Government</td>
<td>• Academic Freedom</td>
</tr>
<tr>
<td>• Faculty Senate</td>
<td>• Compensation</td>
</tr>
<tr>
<td>• Institutional Boards</td>
<td>• Discipline/Field</td>
</tr>
<tr>
<td>• Departmental Committees</td>
<td>• Professional Development</td>
</tr>
<tr>
<td>• Mentors</td>
<td>• Institution(s)</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Discursive Constructions human Actants</th>
<th>Discursive Construction of Non-Human Actants</th>
</tr>
</thead>
<tbody>
<tr>
<td>• What Others Think/Do</td>
<td>• Time</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Political/Economic Elements</th>
<th>Sociocultural/Symbolic Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• College is Expensive</td>
<td>• Affordability</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Temporal Elements</th>
<th>Spatial Elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Autonomy</td>
<td>• Student Access/Use</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Major Issues/Debates (Usually Contested)</th>
<th>Related Discourses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Professionalization</td>
<td>• Awareness of Support Resources</td>
</tr>
<tr>
<td>• Relevant Experience</td>
<td>• Cultural Heritage</td>
</tr>
<tr>
<td>• Affinities/Goals</td>
<td>• Student Experience/Outcomes</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other kinds of human elements</th>
<th>Other kinds of non-human elements</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Unexpected Onlookers</td>
<td>• Accreditation</td>
</tr>
</tbody>
</table>
recognition, academic freedom, equitable compensation, disciplinary standards, professional development, institutional culture, and other variables that were most overtly shaped by the isolated policymaking of these groups. Faculty often struck a discursive balance between admiring/pursuing what others were doing in their own classes and the time it would take to invest comparable effort. Map elements like “College is Expensive,” “Affordability,” “Autonomy,” and “Student Access/Use” may not hold a parallel structure grammatically, but all were capable of representing multiple meanings in the context of the situation. A faculty member who attended OTN training might have considered college expensive with or without accessing the data presented to workshop attendees. Affordability could denote both low costs and afforded sociocultural value. One’s sense of autonomy could both structure and impeded one’s efforts across time. Likewise, the spatial dimensions of student access/use could reasonably consider both where and how a student would obtain access to elements of the situation.

Finally, the contested influences that both emerged from the data and defined later mapping procedures were the discursive elements that problematized one’s efforts in professionalization, experiences as relevant, and interests as valuable in the context of instructional change. Factoring in the presence of unanticipated audiences and regulations on the educative acts of faculty seemed as practical as it was superfluous by the end of the ordered mapping process. Simply, the likelihood that faculty would encounter unexpected influences was high, but those I interviewed had far more concern for the factors they expected to weigh on them. The situation I experienced in struggling to map any more reasonable variables seems compatible with what Clarke proposes as a heuristic
for determining whether someone has reached saturation with their data: “If some virus wiped out your computer files and your notes, and all you had left was this piece of paper, could you work your way back into all the major stories you want to tell about the situation?” (p. 109). In my case, a deep familiarity with the data allowed me to make and break logical conclusions therein. Relational mapping proved to be the complementary step for such practices of (dis)assembling practices, as it confirmed how the map elements that I outlined could provide “a systematic, coherent, and potentially provocative way to enter and memo the considerable complexities of a project laid out in a situational map” (Clarke, 2005, p. 103). The relational maps (Figures 4.3, 4.4, and 4.5) help reveal how the motivating values of faculty are directed, received, and redirected across situations of instructional change.
Figure 4.3. Pedagogical change relational map. This figure maps two paths by which relationships with various actants may influence a faculty member’s choices about pedagogical change.

In situations where faculty would confront the prospect of instructional change, a web of relationships built on pedagogical necessity seemed likely. Indeed, the perspective volunteered by those I interviewed articulated two paths of remediation between human and non-human actants. These paths stem from finding some importance in the experiences/outcomes of their students. On one path (orange line), pedagogical importance would lead faculty to inventory their understanding of self, the technology available for use, or concurrently consider both. A path driven by technology would then
lead to explore instrumentality via mechanisms of support and the examples of others from which they might borrow. Alternatively (purple line), a path led by convictions of pedagogical identity would lead faculty to consider the educative ethos that they share with others who have navigated this situation before exploring human and technological resources. The second path bound pedagogical importance to the exigencies of modern teaching and learning. Simply how students access/use instruction and what value that instruction affords students/instructors would be of instrumental concern for faculty as they consider their student experiences. And both directions beget and are benefited by the professional development of faculty pursuing them. For example, faculty who attend the OTN workshop seeking to address issues of college affordability alone are likely to leave with an enhanced understanding of how student access/use of open textbooks can mean more than mere reading thanks to OER-enabled pedagogy. Alternatively, those faculty who enter into OTN training with an interest in encouraging better student engagement with course materials may leave valuing the day one access and open licensing affordances of open textbooks. While faculty are unlikely to completely navigate either path via any of the four directions mapped above, the relations identified are not so abstract as to be inappropriate to consider in moments when an instructor contemplates educative action.
Figure 4.4. Self-change relational map. This figure maps four paths by which relationships with various actants may influence a faculty member’s choices about who she is as both an academic professional and person.

A relational map assessing self-constitution (Figure 4.4) proved to be far more complex in terms of interdependencies than one that reconciles the elements influencing pedagogical change. In the most complex path, a faculty member’s sense of self seeks immediate confirmation from either their institution(s), the activities/perspectives of others, or both (purple line). What would result is either a loop in which activities are endorsed by one’s supervisor(s) and supported by institutional standards for time and autonomy, or a terminal path in which the feasibility of one’s will to act could be confirmed by the examples set by colleagues. Less complex is a looping path that would
culminate in professional development and validate an instructor’s intended activities by technological and/or pedagogical means (orange line). Finally, as evidenced in both the student and teacher experiences of interviewees, one’s relationship with a concept like academic freedom and her own discipline/field would not demand or depend on the influence of others in order to trigger activity. Rather, an instructor could pursue the former without a clear definition of what it means for her or others at an institution thanks to the sacred quality of academic freedom among educators. The latter, especially considering how transdisciplinary the perspectives of faculty were, is what they would make it.
Figure 4.5. Social change relational map. This figure maps three paths by which relationships with various actants may influence a faculty member’s public choices about instructional change.

In the third relational map that I developed (Figure 4.5), I sought to uncover the more overtly extrinsic factors at play in the situation. A common theme among faculty was that, while it was not necessary for an institution to incentivize their activities, formal rewards and recognitions were important if they were working on behalf of an institution. Perhaps the most interesting path in this map is the one that concludes with the concept of intellectual property (purple line). The reason that this path is unidirectional is two-fold: (1) this representation accounts for the confusion and accompanying ennui among faculty about how institution(s) and publishers handled their copyright, and (2) those who
developed instructional opportunities (e.g., courses, materials, programs) for an
institution that never used these resources were likely to value the rewards at the time
over the questionable ways in which the conclusions of their efforts reflected on them as
authors/creators. Another terminal track (green line), examines the social responsibility
that some faculty felt for addressing the high cost of college. The line terminates with
affordability to because these faculty could have been as likely to pursue the
transformative properties of open content as they might settle for a less expensive
commercial textbook. The third track (orange line), in many ways, recounts the standard
means of incentivizing faculty to pursue particular instructional goals by clearly
compensating them and their colleagues as they learn about and help realize the goals of
institutional leaders and support staff. Worth noting is how a faculty member’s autonomy
is mediated on either side by either political (leadership) or technical (support staff)
values. This thread illustrated for me just how oppressive faculty development and
incentive structures could be for faculty. As I moved into processes of mapping faculty
positionality on instructional change, the complicated influence of institutional support
structures compounded.

**Faculty Positionality Toward Instructional Change(s)**

Clarke promotes positional maps as “simplification strategies for plotting
positions articulated and not articulated in discourses” (p. 86). The insights gained
through values coding thus proved invaluable as strong values, attitudes, and beliefs
shape the positionality of items in each map. Where situational maps helped me tease out
the relationships between living and nonliving elements in moments of instructional change, positionality mapping allowed me to “articulate doubts and complexities where heretofore things had appeared “unnaturally” pat, sure, and simple” (Clarke, 2005, p. 127). As described throughout the last few chapters, faculty responses to the situation being analyzed are available for review. What is common practice, however, is for onlookers to examine faculty processes like the last path I described and glean surface-level recommendations of more collaboration with colleagues, better compensation, improved articulations of institutional goals, broader awareness campaigns, and so on. Instead, the following three maps allowed me to articulate that faculty activity is not necessarily the product of more or fewer persuasive influences; it could be that faculty simply expect different stimuli if they are going to invest high levels of effort and interest in a cause.

Postulating that one’s positionality is rooted in the interests and efforts that they find important, the following three maps were selected as the most productive due to their nod to an instructor’s educative ethos. Accordingly, the axes of each chart represent the amount of interest (vertical) and effort (horizontal) that would be necessary to maintain a position that produces educative activity. The four quadrants of each map thus represent an extreme that honor’s Dewey’s (1913) observations about how now not all activity is educative. Those endeavors comprising high interest and low effort may be uneducative for their fleeting novelty. Low interest, high effort activity may prove miseducative in so much as the activity is conducted without a strong sense of purpose. Low interest, low effort activities are on the other end of the spectrum from those that may be educative, so
I have labeled them noneducative in that they are not neutral but a negative influence on more educative positionality. The *neutral* position of each map, as I learned, is not actually neutral at all. This position is a negotiation of all quadrants and is ultimately responsible for the theory that will be further outlined in Chapter Five.

In figure 4.6, the positional map of faculty experience references the ways in which one's life experience might organically inform her positionality toward instructional change. A position that may yield educative results for a faculty member on this spectrum is one that considers all life experiences as relevant to her work and, importantly, she finds importance in the act of sharing these linkages with others. For the faculty member I interviewed who, in addition to developing her own digital learning platform, explores interests from a range of disciplines in her teaching and scholarship, she occupies a position akin to the educative one articulated here. That said, she did not always feel like she could occupy such a position. Prior to her earning tenure and gaining recognition for her efforts in teaching and scholarship, her position more closely resembled that which I described in the center of the quadrants: “My experiences as a student undergird my expectations for academe.” Starting her student career at a liberal arts college, she was encouraged to pursue her interests in music and disciplines outside of her chosen disciplinary home (physics). Going on to teach at a liberal arts college for most of her career would have suggested a return to form for her after earning a terminal degree at a large research institution. What differed, however, is that tenure-track faculty are seldom encouraged to explore their curiosity in the same cross-disciplinary terms as students. Further, because her interests took her to the forefront of exploring technology-
enhanced instruction, it took some time for her to find an audience in the scholarship of her field. As a result, she now invests in junior colleagues in the ways that she was and would have like to be earlier in her career. Her bold disclosure of her academic path thus shares a dual educative role—one that is equal parts aspirational example and cautionary tale. Simply, it seems clear that it was not always advantageous for her to so openly broadcast her instructional choices.

Figure 4.6. Positional map of faculty experience. This figure maps how faculty value their experience in terms of the interest and effort needed to hold such positions.
An exemplar for the educative position described in Figure 4.7 could be found in the sole tenure-track faculty member who frequents professional development opportunities across campus, makes deliberate use of free (though not technically open) course materials in her classes, and takes great pride in scaffolding a more diversely global perspective among her students. There exists a tight relationship between the efforts she models, however, and the ways in which they are sponsored by academic freedom. While her home discipline (foreign languages) is more culturally responsive than some others, the native culture from which she develops curriculum is a generally European one. Further, she acknowledged that there is only so much flexibility in the standard language classes that she has taught. Her topics courses best represent who she is as a member of various education, professional, and cultural institutions. Her instructional choices also raise certain questions about the positions that support staff want her to adopt and the positions she arrives at herself from participating in faculty development. Repeatedly in my interview, she referenced an OER that she uses to teach students about the Holocaust. After perusing the materials and following up with those who maintain these educational resources, they proved to be fully copyrighted and thus not open. Though the materials were free to use for educators, they did not observe the sustainable, customizable qualities of openly licensed content. Under the veil of academic freedom, even the most well-intentioned faculty member could lose sight of the greater contexts of their instructional choices. And, in such situations, support staff only have so many means of identifying where and how they might assist faculty who are unwittingly wandering into difficulty.
Figure 4.7. Positional map of institutional relations. This figure maps how faculty value institutions in terms of the interest and effort needed to hold such positions.

The third and final positional map (Figure 4.8) that I generated considers the expectations that faculty harbor when facing instructional change as part of larger projects in which goals and outcomes may vary depending on how collaborative the endeavor is. The educative position to take in such situations is one where collaboration both inspires interest and promotes effort. This position recognizes the value in working together instead of in isolation, regardless of who the collaborators might be. For the professor whose instructional efforts seek to augment students’ in-class learning with
entrepreneurial practice outside of class, who is currently developing OER with departmental colleagues, and who supplements her knowledge with participation in collaborative design projects outside of her educational institution, the value of working with others to reach goals carries the conviction that, together, she might even surpass the goals for herself. And yet, neither the nature of her current position nor past experiences that she encountered at other institutions were conducive for collaboration. At a previous institution, her collaborative capacity eventually plateaued because she did not have the credentials or traditional values that her department leadership expected in order to take her seriously as a colleague. While she is appreciated by colleagues in her current role, her supervisor is prone to remind her that the projects she pursues are not always necessary for the role that she occupies as a non-tenure-track instructor. Just as I interpreted for the other two positional maps, there is a fine line between a faculty member adopting on an educative position and her actions succumbing to negotiation from other positions among the quadrants I identified. The more careful, confident course of action is thus the most moderate one: collaborating only so much as to secure specific outcomes. Taken with the conclusions drawn from the other positional maps, faculty who face instructional changes are warranted in withholding communications, reserving experiences, and concealing actions that they value. The efforts that an instructor finds important may prove valuable to her work but may also put her into compromising positions with others. Such are the social worlds and arenas that she is forced to navigate when instructional change looms.
Social Worlds/Arenas for Faculty (Non)Users

In the final stage of situational analysis, Clarke encourages adherents of the method to enter once more into the situation of interest and make “collective” sociological sense out of it (p. 110). We pursue questions of “What are the patterns of collective commitment and what are the salient social worlds operating here?” (Clarke, 2005, p. 110). As demonstrated in other maps, the intent of those in a situation to act out

Figure 4.8. Positional map of project performance. This figure maps how faculty value undertaking projects in terms of the interest and effort needed to hold such positions.
and inevitably cross boundaries is a given. Such mobility volunteers “empirical”
determination of who—which collective entities or social worlds—occupies an arena
(Clarke, 2005, p. 113). My process in mapping the social worlds/arenas (Figure 4.9) of
the faculty holistically examined the discursive interactions between entities of the
previous maps in the context of course material adoption strategies described during
interviews. Three social worlds emerged in the context of faculty adoption of
instructional technology: (1) those in which faculty choices valorize big-box level
assurances about selection and quality of technology being adopted, (2) those in which
faculty desire a boutique-like experience that balances convenience with a commitment
to realizing specific goals, and (3) those in which faculty navigate instructional changes
by crafting creative solutions that reflect their idiosyncratic expectations.
Figure 4.9. Social worlds/arenas of faculty adoption. This figure shows the scale and public visibility of technology adoption styles (as named by interviewees) as well as their common relationship with the hidden endeavors sponsored by educative reticence.

**Juggernaut Adoption.**

The most ubiquitous social world is also the most predictable and least personal for faculty. Adoption in this realm seeks one-stop enterprise solutions and publisher products that are backed by such high levels of resources and expectations that one
interviewee felt compelled to refer to such a solution as a juggernaut in her academic field. Administrative assessment of faculty use, standardization of instructional practice, and reliable content delivery by third parties are a few social commitments that favor big-box adoption. Because the sustainability and scalability are bound to the choices of institutions, not of individual faculty, this social world is more common (hence its size in the figure above) and the practices that reside there are more public (hence this world featuring the lightest shade of gray).

Diversified Adoption.

Those interviewees who pieced together their material choices from a range of available options repeatedly said they did so in service to diversity or the need for diversified experiences that were tailored to the needs of their unique cohorts of students (e.g., augmenting textbook readings with newspaper articles, negotiating special editions with publishers, compiling selected readings as a course pack, and so on). This social world may facilitate more personalized enterprise and experience, but it may also only be accepted by institutions on a provisional or pilot basis. The textbooks of the OTL fit this model well for those who attend workshops: institutional stakeholders care enough about open textbooks as an instructional solution that they joined the OTN and facilitated a workshop, but options for content and support are limited. Because of these limitations, the need for faculty to go rogue in practice or seek support from non-institutional entities may warrant additional concealment. In other cases, faculty relations in this social world
may not be institutionally knowable or commendable as faculty engage with third parties directly.

**Entrepreneurial Adoption.**

The third social world occupied by the faculty I interviewed has the fewest subscribers, is the riskiest, and least likely to be endorsed by an instructors’ institution. Yet, all appreciated the practices embedded in adoption activities wherein instructors spurned preexisting course materials in favor of crafting their own. Whether they were developing materials from scratch, supplementing course materials with their own resources, or adapting content to better suit the needs of students, craft adoption was both the most personal and agile form of adoption that a faculty member could pursue. Due to how idiosyncratic and, often, isolated choices are in this realm, the faculty navigating this social world tend to be more protective of their work.

**Arena of Educative Reticence.**

Common among all of these social worlds was an arena of social (dis)engagement that I have come to refer to as *educative reticence*. In more descriptive terms, educative reticence is found in the when faculty withhold communication, reserve their experiences, and conceal their actions from others, lest they become accountable to the values of others. As the Social Worlds/Arenas Map depicts, not all worlds net the same degree of influence from educative reticence, but my theory raises the idea that it is omnipresent. Simply, there are specific negotiations in all three worlds that may be worth hiding from others.
One of the reasons that educative reticence became so apparent in the activities of faculty is that any instructional change, at best, is an act of adding to rather than a replacing or streamlining of one’s educative practices among more inventive or innovative terms. By acknowledging that a faculty member’s pursuit of instructional change is both (un)predictably mediated by a web of living and non-living actants, any resulting choices, acquisitions, or activities are additive, not augmentative or transformative. When one adopts an instructional change, she advances her educative capacity as well as the experiences, institutions, and commitments that comprise it. If this addition is not intrinsically or extrinsically valuable, there is little at stake in betraying the ideal standards and practices of a specific pedagogy, modality, or tool. This is especially the case when an instructor is already in the habit of not disclosing the interests, experiences, and efforts that she finds important but that others may not. There are merits to educative reticence, and we will explore these further in Chapter Five.

Summary

The ten faculty who I surveyed, interviewed, and analyzed through values coding and situational analysis had as much in common as they did not. Though the insights I developed via values coding alone might have carried this study to productive places, I hope that this chapter has demonstrated just how meaningful the mapping processes of situational analysis was to this study. This second stage of analysis was indeed able to “offer new modes of interrogating data analytically, demanding careful consideration and considerable reflexivity on the part of the researcher” (Clarke, 2005, p. 141), and is
responsible for the theory of *educational reticence* that I have introduced. In the coming chapter, I will further discuss how this theory and accompanying findings address the research questions of this study, complement the literature that served to inform my perspective of faculty development, and begs for specific responses from the educational community.
CHAPTER FIVE

THE MERITS OF OUR EDUCATIVE RETICENCE

(1) Everyone has the right to freedom of peaceful assembly and association.

(2) No one may be compelled to belong to an association.

(“Universal Declaration of Human Rights,” 1948, Article 20)

I did not expect to explore the nature of contemporary faculty learning and development in higher education when I set out to study why specific faculty were not interested in adopting open textbooks. Yet, in my reverence for Straussian grounded theory and the analytical method that Strauss’ student Clarke developed—situational analysis—in response to the postmodern turn, my focus on open textbook nonusers abruptly expanded beyond what they value in the content that they learn. Of broader importance was considering how methods of teaching them and expectations for faculty learning force them to learn other lessons: namely, how and why secrecy is a boon to one’s self-preservation as an educator. The motivating values of the faculty that I studied thrived beyond the context of their OTN workshop attendance because what they took away was not redressed in meaningful ways by those who facilitated the event; they continued to invest in students along lines that made sense to them.

For most interviewees, the workshop was just one of many training sessions provided by staff at their institutions. For others, it resembled an information session like those which they might have encountered from an educational technology or publishing vendor. For all of them, including those who reviewed textbooks in the OTL, it was not immediately clear when the event took place and what they had retained from the session.
Despite the uncertainty of topics covered in the session or their impressions of the open textbooks which they considered, what proved most impressive was how every faculty member harbored, specific reasons for doing what they did as instructors. And, in many cases, their choices were compatible with a greater continuum of OER use as well as the pedagogical approaches enabled by open licensing. While many instructors cared about the cost of their course materials and the conditions of student access to those materials, they were capable of implementing several lower cost or free solutions that were not necessarily open (though some were). In all cases, faculty cared about their students’ learning experiences in-class and beyond, adjusting instruction and support accordingly.

Reflecting on my research process—one in which semi-structured interviews were designed to build relationships between interviewees and me, the interviewer—I find myself wondering how often the faculty I spoke with are approached in similar terms by those who support them locally. Through my interviews, I uncovered, for instance, that only one faculty member was contacted in meaningful ways after the OTN training concluded. Others were either added to generic email lists or cut loose, presumably, because of the disinterest that they indicated regarding open textbooks. Though their future use of open textbooks or OER more broadly is an uncertain prospect for many of the instructors I spoke with, their positions are insightful nonetheless. For every instructor who perceived futility in how open textbooks might do no better than commercial materials in getting students to read and retain information, multiple others were actively building supplemental resources or facilitating extracurricular learning opportunities for their students. When faculty development opportunities are intended to shepherd use of a
specific tool or technique, those of us who design and deliver these sessions are best able to account for or attempt to persuade instructors whose choices already align with the technology being pitched. An open textbook is most appealing for someone who already assigns a commercial textbook in their courses.

Though such faculty development strategies are tidy, they are not exhaustively relevant for all faculty. My research suggests that they are increasingly less effective in engaging faculty who are already acting in ways that they believe enhance the student experience even though this likely hidden activity may be more complex than the alternative solutions we are trying to present to faculty. This position—taking interest in and expending effort toward improving student learning experiences—is a powerful one because the urgency that an educator recognizes is more important than any insecurities that she might harbor about the methods, (in)efficiencies, and scalability of her practice. As a result, doubling-down on adaptive learning software, abandoning commercial textbooks, and pushing the boundaries of fair use are just a few of the more complex alternatives that my interviewees explored instead of adopting OTL materials. While open textbooks may align well with these practices, an instructor does not need to undergo training to advance educatively in the lives of her students. The notion that those of us who sponsor faculty development might assume that faculty need our help (or even permission) to do so is both part cause and symptom of educative reticence.
Finding Educative Reticence

As introduced in the previous chapter, there are some activities related to instruction that faculty are reticent to share for myriad reasons. Even for those tenured faculty who have in many ways overcome the concerns that they once harbored about their scholarship, teaching practices, and relationships with other academics, their mentorship of junior faculty in these areas show the ubiquity of educative reticence among postsecondary faculty: successful navigation of the profession requires a certain degree of restraint in expressing who you are and what you care about, especially if these things confound the normative expectations of a discipline or institution. Most jarring, perhaps, is the experience of those faculty who must confront this reality after a student career in which their transdisciplinary exploration was nurtured by others across boundaries. At its simplest, our institutions and the expectations that they promote do a poor job of recognizing the joy that instructors may find in exploring their own curiosity. Yet, alternatively, it is increasingly common for us to expect them to facilitate playful learning experiences for students. It should come as no surprise then that faculty would want to pursue interests on their own terms outside of an institutional gaze.

The theory.

The values informing efforts by those faculty who I studied have led me to two productive observations: (1) that the values, attitudes, and beliefs I uncovered are not unique to a small population of open textbook nonusers and (2) that the “best” practices
of use/adoption that many of us expect faculty to adhere to are more problematic than an instructor’s fringe implementation of various educational tools and techniques. What makes sense to trainers, vendors, and administrators does not necessarily respect an educator’s experience. And so, when faced with a choice between adopting an instructional change as expected by authoritative others and shaping her own expectations with students, it is little wonder that an instructor would choose the latter activity.

When professional development incentives are high and expectations for follow through are low, it seems reasonable that faculty, like many of those I interviewed, will participate in training regularly, take away only what they see as relevant for their instruction, and experiment with bricolages of old and new instructional practice. Given the unlikelihood that faculty (like any learners) will do exactly as they were trained, I am inclined to believe that educative reticence exists in a pervasive sense, that it foils outcomes-based faculty development strategies, and that both scenarios are warranted for improving teaching and learning. To recognize the presence of reticence in the choices of an instructor is to anticipate unwillingness to broadly share the experiences that inform her worldview, restrain herself in communicating with others superfluously, or conceal her educative activities from view. It thus seems unlikely that standardized workshops, training modules, course materials, and communications strategies are going to comprehensively connect with all faculty. And when we expend minimal energy in how we inform faculty about institutional expectations for their teaching, why should we expect them to observe anything more than the bare, sanctioned minimum? To develop
training with little more than assumptions about the general character of a faculty
population at an institution or, at best, by way of disingenuous archetypes for who these
instructors might be as users, is to design professional development experience with no
real audience in mind. The presence of educative reticence suggests that even those who
do show up for a training session may only be so present.

*Its merits.*

As part of an instructor’s decision—likely an optional one—to adopt an open
textbook, what is expected for her use may or may not complement her teaching
practices. As such, there are merits to any of her underlying reticence. As highlighted in
Chapter Two, there are institutional constraints to academic freedom that may not be well
known to faculty. Yet, only those faculty who disclose instructional practices openly need
to defend the scope of academic freedom informing their efforts. For those who conduct
similar activities but for only an audience of their students and, perhaps, trusted
colleagues, they are only accountable to those who likely regard their instructional
creativity as astutely relevant at best or well-intentioned at worst. Generalized “best
practices” cannot compete with the specialized investments of instructors working in
isolation.

Faculty thus set their own terms for academic freedom under educative reticence.
When reserving her educative practices for select audiences, an instructor who fails to
meet the needs of learners is capable of adjusting her own practice fluidly with little more
than student feedback as her guide. Alternatively, an instructor who publicly champions
an institutionalized practice (e.g., using OER) may face commentary and even challenges from a multitude of onlookers who will then implore her to adopt additional practices, explore other technologies, and reevaluate her professional learning. The clearest reward for observing educative reticence is that faculty who iterate their instructional practice in a vacuum have complete ownership over their choices. When a need for change arises, a practice protected by reticence need only respect the relationship of an instructor with her students. Alternatively, practices that are institutionalized via faculty development carry with them expectations that a faculty member would only seek help in order to “correctly” modify her instruction.

Because faculty development cannot ensure a 1:1 relationship with faculty learning, positive interactions with students may be all that is necessary to convince many faculty that what they are doing is effective enough. Just as exposure invites greater scrutiny, educative reticence makes one’s ethos vulnerable to only those who have access to it. As such, faculty may be inspired to play more completely in the ethe of their own educative identities since they do not have to defend their character for anyone beyond those with whom they already find a familiar connection. Accordingly, faculty need not try to reconcile their disciplinary identity when the extent of their interests, experiences, and values are deliberately withheld from others. One’s raison d’etre does not need to be fully disclosed for her to act as a functional colleague. Furthermore, educative reticence maximizes an instructor’s compensation in cases of incentivized faculty participation because ongoing expectations about faculty may be lower when they avoid or reject follow-up after a session. I am not under the impression that those who reviewed
textbooks for the OTL consciously pursued this strategy, but they could not be blamed when monetary incentives abound for faculty and oversight varies once funds are dispersed. One final merit of educative reticence is not worth discounting: reticent faculty do not need to confront being told “no” nor hear that what they are doing is wrong. Instead, they and their students are the ultimate judges of what works in a specific learning context.

**Channeling Educative Reticence**

As described, institutionalized support and assessment measures are as responsible for the proliferation of reticence as the faculty who strategically reserve the exposure of their educative acts. Whether extrinsic or intrinsic, the motivational forces of reticence are considered, calculated, and otherwise accounted for by faculty. As a result, I am reluctant to consider educative reticence the opposite of *open educational practice*. Both are chosen paths that may prove productive aids to one’s efforts in teaching and learning. I find a more productive concept in how Collier and Ross (2017) raise *not-yetness* as a critical lens for exploring the boundary crossings that accompany openness since one’s status as open is not always the product of deliberate choice. They claim, The rhetoric of openness in education has come, ironically, to represent a much more constrained set of possibilities and practices than many researchers and educators might have expected in the years leading up to the explosion of high profile initiatives in areas such as massive online courses and open educational resources” (p. 10).
In other words, exemplars of what open looks like (e.g., open textbooks) have a cooling effect over the novel, inspired appropriations of openness: those who assign commercial textbooks may simply replace them with open textbooks. This observation aligns well with my discussions of openness in Chapter Two in which I highlighted how the qualities of OER as tools for sharing and optimizing knowledge can overshadow the pedagogical potential that exists for those who utilize them to the full extent of openly licensed permissions. In kind, institutionalized and therefore readily observable educational practices can stymie the pedagogical creativity of faculty in addressing instructional problems out in the open. Just as Collier and Ross position not-yetness as a means of refocusing attention on the variability of context and, thus, offsetting “the tendencies of OERs [sic] to assume a one-size-fits-all approach” (p. 11), so too may educative reticence function in the context of faculty development strategies because not all faculty address instructional change in the same way.

For those who design and deliver training to faculty, it behooves us to consider how we might identify the contextual variability in what motivates faculty to attend training and modify instruction. As such, I recommend that a theory of educative reticence as I have described it complements the capacities of not-yetness in “grappling with the uncertainty and complexity which accompanies educational and technological change” (p. 9). Where not-yetness sponsors analysis of potential applications for openness in a situation, acknowledgment of educative reticence allows us to consider the merits of withholding educative acts in those same situations. Take the example of a faculty member who uses a commercial textbook in classes: not-yetness may account for
varying paths of increasingly open practice—from adopting an open textbook to creating one from scratch, while educative reticence would help explain why she did not explore presumed paths (e.g., adopting an open textbook after reviewing one) as well as the follies of pursuing an institutionally-endorsed path. Not-yetness and educative reticence may thus function as counterparts of sorts on the same spectrum of adaptive decisions (Figure 5.1). The former emphasizes proactive and latter reactive processes in decision-making. Alternatively, a spectrum of maladaptive decisions would seem to exist between the liminal acts of resistance and institutionalized sense of openness that harbor more impersonal, stubborn adherence to or rejection of institutional standards. And so, I suggest that Not-yetness is to uncritical acceptance of institutionalized—and therefore sanctioned—openness as educative reticence is to liminal resistance (i.e., choices made solely in general spite of institutional standards if targeted at all).
Figure 5.1. Spectrum(s) of choice for instructional change. This figure illustrates how the prospect of change sparks low/high interest and low/high effort in faculty and leads them to make various choices across a spectrum of public and private activity.

The diagram above recounts how expenditures of effort and interest shape an instructor’s navigation of instructional change arenas (not-yetness, institutionalized openness, educative reticence, and liminal resistance) as part of her decision-making process. As an analytical tool, Figure 5.1 may be considered a single continuous spectrum in which the prospect of instructional change elicits faculty consideration of all arenas.
and any resulting decisions harbor various conditions of high/low interest/effort. This sort of thoughtful, complex process in navigating instructional change is perhaps ideal for ensuring that the sustainability of that change is balanced in negotiation between a faculty member and the various human and non-human actants influencing the situation she finds herself in. Take, for example, the change prospect of replacing a commercial textbook with an open alternative: equilibrium between these four arenas may span space and time as little effort is needed for an instructor to find materials that are institutionally open, little interest provokes her individualized resistance, reticence initiates adoption on her own terms, and not-yetness begs her to consider the ongoing potential of open textbook adoption.

Alternatively, Figure 5.1 accounts for more narrow spectrums of faculty choice. High interest, high effort activities, for instance, lead to adaptive decisions in which a person negotiates her social being (reticence) with her technological becoming (not-yetness). An example of this would be the commitment to creating, sharing, and maintaining OER that serves her and her students well as they continuously improve the form and function of materials. An OER example of low interest, low effort activities could be found in the cynical adoption of an open textbook that already exists not because of its potential for saving students money or promoting access to materials but because a faculty member assumes that she needs a textbook, students will like that it is free, and they will not read it anyway. The resistance in this case is a refusal to find value in course materials generally and in the pedagogical implications of OER specifically. This is why I think it is reasonable to consider how proactive decisions fall on a spectrum
of high effort and low interest activities; a person can invest a lot of effort in doing something that she does not care about while also making others happy and preemptively mitigating any grief that she might receive.

If an instructor already does not care for the role of commercial textbooks in her courses, the requisite effort to adopt an open textbook alongside her colleagues will not necessarily spark additional interest in OER. Reactive decisions, alternatively, likely feature some combination of high interest and low effort activity because the value that someone might place in maintaining the status quo is augmented by her unwillingness or inability to effectively counter a proposed change. In OER, this could lead to cases where a faculty member adopts low-cost options instead of fully open course materials. Each arena mapped in 5.1 extends outside of the overall spectrum because not all social arenas produce decisions about change. Further, gradation among the spectrum alludes to how the activities in some arenas (not-yetness and institutionalized openness) are more visible (light gray) than corresponding arenas (educative reticence and liminal resistance) in which concealed processes, reasoning, efforts, and so on may prove beneficial for a faculty member but remain blacked-out for onlookers. Where all choices present some degree of friction as faculty negotiate their values with others’, however, not all friction should be considered resistance.

**Resisting Assumptions of Faculty Resistance.**

While “resistance” is a common topic in both change management and faculty development literature, considerations of resistance offer only a partial explanation as to
why a person may choose not to do something at a particular time. I classify one’s resistance to educational change as liminal because of how often onlookers comprehend reluctance to change as a reaction to ambiguous, abstract, and otherwise uncomfortable outcomes. The inherent liminality of resistance in these situations is something we seek to define so as to overcome it and ultimately bring faculty into compliance with our institutionalized values. For such reasons, as I discussed in chapter two, researchers find natural gravitation toward taxonomies of use such as those defined by Rogers’ *Diffusion of Innovations* theory. These classifications are attractive in that they allow us to chart a tidy path of performance milestones for others. When assessing, say, the degree to which faculty adoption of a specific instructional technology aligns with institution-validated uses taught to them, classification helps us reconcile any resistance as contextual—tied to specific stages of awareness that can be curbed by subjecting instructors to more relevant experience.

Logically, if faculty resist OER because it is too abstract, we may get them to take interest by formally introducing them to the more familiar form of open textbooks. If to learn is to accept new awareness, reasonable multimodal strategies for faculty development might consider the comfort level of faculty with technology and methodically expose them to relative advantages of instructional technology, demonstrate the efficacy of a tool in enhancing teaching and learning, provide opportunities to “test drive” a solution, and show how adoption fits within their teaching philosophies (Bennett & Bennett, 2003). The technocentric matrices of archetypes (uses and users) that arise, however, are likely to position responsible faculty as those who use-as-intended and
resistant ones as those who need to be coerced into meeting our framework-based expectations. In turn, we might be led to wonder, “How can I make a technological change seem more salient and get faculty to try it?” Such thoughts may lead us to “how” without, perhaps, forcing us to consider “why” we might so easily disregard the unique qualities comprising instructor choices when facing a new technology, associated tasks, and our training/support.

Where a focus on resistance may allow us to note where faculty occupy non/compliant positions within a framework, it also casts faculty dissent in pejorative terms. We may see those educators who choose not to adopt or do not adopt like others do (and especially as we have trained them all to do) are lacking effort, interest, concern, commitment, information, incentive, and so on. Yet, how often do we arrive at such perspectives from our own place of resistance—one where investigating what instructional change might mean for a faculty member demands more effort, interest, concern, commitment, and information than we are incentivized to muster as support staff? Further, a preoccupation with points of acceptance/resistance do little to authentically inform us of why faculty made the choice they did and to what degree. For example, all of the faculty I spoke with valued some aspect of the OTN workshop. This does not mean, however, that interviewees all had the same valuable takeaways nor that they could readily recall them without certain conversational prompts. Further, contextual memory developed and maintained in isolation, like that of my interviewees who were never contacted after completing OTN training, may have evolved dramatically from others who had held deeper relationships with the material or facilitators of OTN training.
As Vos and Rupert (2018) found in their quantitative study of change agent and recipient perceptions, the two groups experience a person’s resistance to change differently and have different interpretations of how those who sponsor change increase or decrease the resistance of those undergoing it (p. 459). Where the change agents that they studied across a variety of projects and organizations generally thought that they were incapable of decreasing resistance in others, they acknowledged that they were capable of increasing resistance by way of their leadership. In contrast, recipients of change leadership tended to think that the influence of change agents decreased their resistance and that an ongoing process of engagement made the prospect of change more palatable. As such, Vos and Rupert determine, “How perceptions of both agents and recipients evolve and how that relates to the decrease or increase of resistance over time is an additional promising line of research” (p. 461). The perceptions identified by their research map onto my own findings well: facilitators of OTN training may have seen follow-up with disinterested faculty as futile, yet, all instructors had favorable opinions of the faculty support groups of their institution and demonstrated that they were interested in learning how they could improve the educational experiences of their students. What could have easily been viewed as resistance to adopting open textbooks is far more complicated, contingent, and concealed thanks to a lack of active, empathic relationship-building between faculty and those who facilitate OTN-related training.
Toward a Culture of Curiosity in OTN Faculty/Partner Learning

Relationships are key to acknowledging and channeling educative reticence in productive ways. That said, individual relationships are difficult to force and even more difficult to maintain among the competing schedules, obligations, and priorities of faculty and those staff who support their instructional practices. With this in mind, any recommendations that I have for faculty development based on my findings situate faculty learning as most scalable and sustainable at a cultural level. While the prospect of establishing a culture that positively channels educative reticence may seem daunting, a reasonable path forward may be found in a professional community which “locates learning, not in the head or outside it, but in the relationship between the person and the world, which for human beings is a social person in a social world” (Wenger, 2010, p. 1). The emergent structure, complex relationships, self-organization, dynamic boundaries, ongoing negotiation of identity, and contingent meaning-making that communities of practice harbor go a long way toward dismantling more transactional approaches that regard faculty learning as something that needs to be developed to mirror a particular image.

Communities of practice built around instructional change position faculty and those who support their teaching as co-constructors of knowledge which, in turn, positions learning as “a social becoming” (p. 3). Relevant to the recognition of reticence in educative practice, however, is that the importance of one’s identity does not wane when displaced across a community. Rather, Wenger reasons, what materializes is an
“emphasis on the person as a social participant, as a meaning-making entity for whom the social world is a resource for constituting an identity” (p. 2). Additionally, concerns about learning outcomes, effective practice, and collective values may also be appeased in the understanding that “one can identify more or less with a community, the need to belong to it, and therefore the need to be accountable to its regime of competence” (Wenger, 2010, p. 3). Through workshops, information sessions, one-on-one consultations, and other traditional training methods may seem more efficient methods of developing faculty awareness, they are unlikely to foster the same sense of social responsibility that spurs ongoing practice and may incline faculty to look favorably upon the prospect of change as learning with others.

When we learn alongside faculty, we may authentically share our values and empathize with the curiosity, joy, and reticence that motivate their practice. And so I promote a focus on faculty co-learning over faculty development but propose that we need not completely revise our training strategies to establish relevant communities of practice. Expecting learning outcomes for attendees and facilitators alike, promoting collective play with technology before formal training, and designing technology adoption in authentically local contexts are just a few means of raising communities of adaptive instructional support rather than just supporting community adoption of some instructional change.
Revisiting Research Questions

Though I have implicitly answered the research questions that guided my study many times by now, it seems worthwhile to address them explicitly in the context of how educative reticence continually mediates the ability of others to fully comprehend the educative activities of instructors:

1. *In what ways are the motivating values of faculty considered, recognized, and honored by professional development structures?*

   In short, not well. Such opportunities are likely to be designed around the broadest faculty audience possible if they are modified to fit faculty contexts at all. In the case of the OTN workshop, it is reasonable to believe that while some faculty values respond as desired to content about homelessness, food scarcity, and textbook access among student populations, others will not. Additionally, faculty who already use basic textbooks without some sort of adaptive learning platform or online ancillary materials are the optimal target for the workshop as conceived. Few of the faculty I interviewed fit this use case unconditionally, and those who did had values about content origin and delivery that did not immediately comply with what was available in the OTL.

2. *Which aspects of the OTN experience—attending a workshop, learning about the affordances of openly-licensed content, and perhaps reviewing a relevant textbook—miss/engage these values?*
Though partially addressed by my answer to the first question, I think it is important to stress how favorably faculty regarded OER (though not always open textbooks) based on their workshop experience. Where optimism waned, most specifically, was in the review of materials in the OTL. A number of faculty expected open textbooks to be directly comparable to commercial counterparts, and they found this to not be the case (especially in authorial consideration of audience). Other attendees, as mentioned, found no immediate use for textbooks but some were inspired to go produce OER that better suited their instructional needs.

3. What merits exist for faculty who opt not to adopt a readily adoptable educational resource?

As recounted earlier in this chapter, there are many advantages when faculty disclose only partial or inaccurate intent around instructional change. Declaring a specific change is also assuming responsibility for that change to others. One’s responsibilities are far less complex when, under the shroud of reticence, an instructor may practice change without formally declaring it. Enacting educative reticence ensures complete control over academic freedom when one is able to adopt instructional change on her own terms, outside the gaze of authoritative others.
Transferability of this Research

Though this was an exploratory study, I am confident that the methods used, and theory developed could be employed by researchers in future studies related to faculty development in open, online, and technology-enhanced teaching and learning. I continue to believe that the delimitations covered in chapter three were addressed as part of my research and reporting processes and may be further overcome in subsequent research projects. For those who are willing to take up this cause and further investigate the implications of this study in other contexts, Clarke (2005) reminds us that as trained scholars in our varied fields, usually with some theoretical background, we may also suspect that certain things may be going on that have not yet explicitly appeared in our data. In seeking to be ethically accountable researchers, I believe we need to attempt to articulate what we see as the sites of silence in our data. (p. 85)

My intent over these five chapters has been to do just that, and I suspect that reticence is a site of silence in more contexts than just those that are educative.

Closing Thoughts on Educative Reticence

The authors of EDUCAUSE’s 2019 Horizon Report—an annual publication in which experts of educational technology articulate upcoming trends, challenges, and developments related to educational technology—acknowledge “The Evolving Roles of Faculty with Ed Tech Strategies” as a “Difficult Challenge” that is recognizable but not easily resolved (p. 1). What the panel of experts recognizes in this challenge is that
implementing educational technology is already difficult for any institution before involving faculty members as stakeholders in the “evaluation, planning, and implementation of any teaching and learning initiative” (p. 4). The recommendation that these experts put forward is a general one: “Institutions that address the needs of all faculty through flexible strategic planning and multimodal faculty support are better situated to overcome the barriers to adoption that can impede scale” (p.4). While flexible strategic planning and multimodal faculty support may sound like worthwhile strategies, the likelihood of faithfully and comprehensively addressing the “needs of all faculty” at an institution is low thanks to educative reticence. Moreover, addressing the needs of all faculty seems rife with expense, inefficiency, and difficulty. Yet postsecondary institutions are often willing to commit the resources necessary for reaching all students.

Even those faculty who show up and participate as stakeholders are bound to disclose only that which aligns most favorably with the human and non-human influences around them, regardless of how flexible or multimodal we are in engaging each instructor’s values. This does not mean that we are incapable of consolidating institutional resources and supporting all faculty. Rather, it means that we need to investigate the motivating values and educative acts of faculty even more than we investigate the use and outcomes of their teaching with particular tools. Namely, if we cannot discern an instructor’s educative ethos going in, how can we expect to do so on the other end of a technological change? Once we recognize that examples of educative reticence are openly available for observation and analysis, we might learn to empathize more completely with faculty, develop more responsive professional development
opportunities, and make a culture of curiosity available for all academic audiences—not just students.
Appendix A

Survey Instrument

*Faculty Affinities Toward Course Texts After Open Textbook Network Training*

The following questions ask for more information about how to best contact you in case of necessary follow-up:

What is your preferred name (first and last)?

________________________________________________________________

What is your preferred phone number?

________________________________________________________________

What is your preferred email address?

________________________________________________________________

Are you interested in participating in a recorded, follow-up interview over Zoom? The interview will last roughly one hour and you will be compensated for your time with a $50 Amazon gift card.

- [ ] Yes
- [x] No

The following questions ask you to provide more information about who you are:

How old are you?

- [ ] Under 35
- [ ] 35–44
- [ ] 45–54
- [ ] 55+

What is your gender?

- Male
- Female
- Other (please specify)

What is your ethnicity?

- White
- Black or African American
- American Indian or Alaska Native
- Hispanic or Latino
- Asian or Pacific Islander
- Other (please specify)

The following questions ask for more information about your professional status:

For what type of post-secondary institution do you currently work?

Select all descriptors that apply.

- Two-year institution
- Four-year institution
- Community
- Technical
- Liberal arts
O Research
O Land-grant
O Other ________________________________

What is your current teaching status?
O Part-time
O Full-time

What is your tenure status?
O N/A
O Tenured
O Tenure track, not tenured
O Not tenure track

How many years of teaching experience do you have at the post-secondary level?
O 1–5 years
O 6–9 years
O 10–15 years
O 16–20 years
O More than 20 years

Which of the following have you taught during the most recent academic year?
Please consider the following definitions and select all that apply:

**Face-to-face Course:** A course where all meetings are face-to-face and a learning management system (LMS) or web pages may be used to post the syllabus and/or assignments online.
**Blended/Hybrid Course:** A course where sufficient content is delivered online to create a reduction in the number of face-to-face class meetings.

**Online Course:** A course in which all, or virtually all, the content is delivered online. Typically have no face-to-face class meetings (with the possible exception of proctored exams).

☐ Face-to-face course
☐ Blended/Hybrid course
☐ Online Course

In which discipline do you teach?

☐ Arts and Humanities
☐ Business Administration
☐ Computer and Information Science
☐ Economics
☐ Education
☐ Engineering
☐ Law
☐ Languages/Linguistics
☐ Mathematics
☐ Medicine
☐ Natural Sciences
☐ Philosophy
The following questions ask for more information about your relationship with the texts that you assign in your courses:
What is your current role in selecting the required texts for your courses?

*Select all that apply.*

☐ I am solely responsible for the selection

☐ I lead a group that makes the selection

☐ I am a member of a group that makes the selection

☐ I influence the selection, but do not have decision-making power

☐ Others make the selection, I have no role

☐ Other ____________________________________________

Which types of educational texts do you currently require and/or recommend in your courses?

*Required texts are those listed in the course syllabus as required for all students to either acquire on their own or access through an associated course fee. Recommended items are those that are NOT required of students, but are listed on the syllabus as recommended.*

Required    Recommended    Neither required nor recommended
| Textbook(s) | O | O | O |
| Articles/Case studies | O | O | O |
| Data sets | O | O | O |
| Multimedia (e.g. images, videos, podcasts, graphics, etc.) | O | O | O |
| Other | O | O | O |

How are the course texts that you currently assign licensed?
*Select all that apply.*

<table>
<thead>
<tr>
<th></th>
<th>Copyrighted</th>
<th>Creative Commons</th>
<th>Public Domain</th>
<th>I am not sure</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Textbook(s)</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Digital Textbook(s)</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Data sets</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Articles/Case studies</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>
Multimedia (e.g. images, videos, podcasts, graphics, etc.)

Other ______

<table>
<thead>
<tr>
<th>Factor</th>
<th>Extremely important</th>
<th>Very important</th>
<th>Moderately important</th>
<th>Slightly important</th>
<th>Not at all important</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adaptable/editable content</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Available in print format</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Available in digital format</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Cost to the student</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Comprehensive content and activities</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Easy to find</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Easy to use/navigate</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Category</td>
<td>Yes</td>
<td>O</td>
<td>No</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>-------------------------------------------------------------------------</td>
<td>-----</td>
<td>---</td>
<td>----</td>
<td>---</td>
<td>---</td>
</tr>
<tr>
<td>Familiarity with brand/publisher</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Includes supplemental materials (homework, quizzes, etc.)</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Includes test banks</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Recommended by other faculty members</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Works with my institution’s Learning Management System (LMS)</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Other</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

How satisfied are you with the course texts you are currently using for your courses?

- O Extremely satisfied
- O Somewhat satisfied
- O Neither satisfied nor dissatisfied
- O Somewhat dissatisfied
- O Extremely dissatisfied
The following questions ask for more information about your relationship with OER in general and Open Textbooks in particular:

How familiar are you with each of the following licensing mechanisms?

<table>
<thead>
<tr>
<th></th>
<th>Very familiar</th>
<th>Familiar</th>
<th>Somewhat familiar</th>
<th>Unfamiliar</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copyright</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Public Domain</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Creative Commons</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>

How valuable do you consider the following activities permitted by educational content that is openly licensed?

<table>
<thead>
<tr>
<th></th>
<th>Extremely valuable</th>
<th>Very valuable</th>
<th>Valuable</th>
<th>Somewhat valuable</th>
<th>Not valuable at all</th>
</tr>
</thead>
<tbody>
<tr>
<td>Copying</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Sharing</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Editing</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Mixing</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
<tr>
<td>Keeping</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
<td>O</td>
</tr>
</tbody>
</table>
Using O O O O O O O

How familiar are you with OER?
The William and Flora Hewlett Foundation define OER as "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."

O Extremely familiar
O Very familiar
O Moderately familiar
O Slightly familiar
O Not familiar at all

Have you used OER in any of the following ways for any of your courses?

O Used as required course materials
O Used as supplemental course materials
O Have not used OER
O Unsure

How familiar are you with Open Textbooks (a type of OER)?

O Extremely familiar
O Very familiar
O Moderately familiar
O Slightly familiar
O Not familiar at all
Did you review an Open Textbook from the Open Textbook Library?

- Yes
- No
- I don't recall

*Display This Question: If Did you review an Open Textbook from the Open Textbook Library? = Yes*
What motivated your decision to review an Open Textbook for Open Textbook Network

Select all that apply.

- The potential to save my students money
- The content of the workshop I attended
- The stipend/award associated with my completed review
- The possibility of replacing my current course text(s)
- Other ________________________________________________

*Display This Question: If Did you review an Open Textbook from the Open Textbook Library? = No*
What motivated your decision to NOT review an Open Textbook for Open Textbook Network

Select all that apply.

- My feelings about Open Textbooks
- The content of the workshop I attended
- The stipend/award associated with a completed review did not seem worth my time
- I am happy with my current course text(s)
- Other
What deters you from adopting Open Textbooks in your courses?

Select all that apply.

- It is difficult to find what I need
- It seems like too much work
- There are not enough options for my subject area
- Not high quality
- Not current, up-to-date
- Only digital (no good print options)
- Not knowing if I have permission to use or modify
- Concern about updates and keeping content current
- Lack of a track record for use in my discipline
- Not used by other faculty I know
- Not authored by scholars I know/trust
- Lack of ancillary materials (e.g. homework exercises, quiz banks, slide decks, etc.)
- I do not use textbooks in my courses
- Other

What one change might lead you to adopt Open Textbooks in your courses?

Select one.

- They become easier to find
- They become easier to edit/modify
More become available for my subject area
Higher quality texts become available
Assurance of current, up-to-date content
Good print options are available in addition to digital
Clear permission to use or modify
Assurance about updates and keeping content current
Stronger track record for use in my discipline
Faculty I know start using them
Scholars I know/trust author them
Ancillary materials (e.g. homework exercises, quiz banks, slide decks, etc.) are available
I start using textbooks in my courses
Other ________________________________

Do you think you will use Open Educational Resources (not necessarily Open Textbooks) in the future?

Definitely yes, because
____________________________________________________

Probably yes, because
____________________________________________________

Might or might not, because
____________________________________________________

Probably not, because
____________________________________________________
O Definitely not, because

This instrument is adapted from the one used by the Babson Survey Research Group in their generating their report, *Opening the Textbook: Educational Resources in U.S. Higher Education* (Seaman & Seaman, 2017).

This adaptation carries a CC Attribution-Share-Alike license to reflect the permissions granted by them via open licensing.
Appendix B

Recruitment Materials

Recruitment Email

Call for survey participants: Faculty Affinities Toward Course Texts after Open Textbook Network Training.

Greetings:

I invite you to participate in a brief survey: Faculty Affinities Toward Course Texts after Open Textbook Network Training.

The purpose of this research is to uncover the motivating values of faculty who have received training on Open Textbooks from the Open Textbook Network, searched for a discipline-relevant text in the Open Textbook Library, perhaps reviewed one such text for a stipend/award, and indicated that they did not adopt an Open Textbook after completing this process.

You have been selected for participation in this study because records shared with me by the Open Textbook Network indicate that you belong to this population.

I am conducting this study in partial fulfillment of the requirements for the Learning Sciences Ph.D. at Clemson University, so I appreciate your support of my education. It should also be noted that Clemson is a member of the Open Textbook Network and that the network—based out of the University of Minnesota—regularly contracts me to present on their behalf as a faculty trainer.

I value your time. Most respondents can complete the questionnaire in under 10 minutes and those who complete it in full will be entered into a drawing for a $100 Amazon gift card. Those who complete the survey may also volunteer for potential participation in a follow-up interview, after which each interviewee will receive $50 Amazon gift card.

Thank you,
Jonathan Lashley, Ph.D. Candidate in Learning Sciences
Clemson University
NOTE: By participating in the survey hyperlinked above, you have consented to the details of this study as they are outlined in the attached information letter.

---

Follow-Up Email (Survey, First)

REMINDER: Call for survey participants: Faculty Affinities Toward Course Texts after Open Textbook Network Training

Hello again:

I recently invited you to participate in a brief survey, Faculty Affinities Toward Course Texts after Open Textbook Network Training. The questionnaire takes just minutes to complete, after which you will be entered into a drawing for one $100 Amazon gift card.

My dissertation research seeks to uncover the motivating values of faculty who have received training on Open Textbooks from the Open Textbook Network but did not adopt an Open Textbook. I’m told that you are one of these faculty members.

Your time is valuable, so I appreciate your participation in my study. After taking the survey, you will be eligible to participate in a follow-up interview and receive $50 Amazon gift card.

Thanks!
Jonathan Lashley, Ph.D. Candidate in Learning Sciences
Clemson University

NOTE: By participating in the survey hyperlinked above, you have consented to the details of this study as they are outlined in the attached information letter.
Follow-Up Email 2 (Survey, Second)

There is still time to participate in the survey: Faculty Affinities Toward Course Texts after Open Textbook Network Training

Your time is valuable!

That’s why I designed my survey, Faculty Affinities Toward Course Texts after Open Textbook Network Training, to take fewer than 10 minutes to complete. As thanks for taking my survey, you will also be entered into a drawing for one $100 Amazon gift card.

Because my dissertation research focuses on faculty who have received training from the Open Textbook Network but did not adopt an Open Textbook, it’s critically important that I hear from you.

It is so important, in fact, that if you volunteer and are selected for a follow-up interview, you will receive $50 Amazon gift card!

Jonathan Lashley, Ph.D. Candidate in Learning Sciences
Clemson University

NOTE: By participating in the survey hyperlinked above, you have consented to the details of this study as they are outlined in the attached information letter.
Follow-Up Email (Survey, Final)

*Last call to participate in the survey: Faculty Affinities Toward Course Texts after Open Textbook Network Training*

FYI:

It’s not too late to participate in my survey: *Faculty Affinities Toward Course Texts after Open Textbook Network Training*. It takes fewer than 10 minutes to complete and you could win a $100 Amazon gift card!

Because my dissertation research focuses on faculty who have received training from the Open Textbook Network but did not adopt an Open Textbook, I need to hear from you.

If you take the survey by Friday and volunteer for a follow-up interview, you could also receive a $50 Amazon gift card if you contribute additional data to my study as an interviewee.

Thanks for supporting my education and career!
Jonathan Lashley, Ph.D. Candidate in Learning Sciences
Clemson University

**NOTE:** By participating in the survey hyperlinked above, you have consented to the details of this study as they are outlined in the attached information letter.
Call for Participation (Interview)

Thank you and next steps

[Name of prospective interviewee]:

Thank you for contributing to my survey, Faculty Affinities Toward Course Texts after Open Textbook Network Training. Additionally, I am delighted that you are interested in participating in a follow-up interview.

At your earliest convenience, please identify any 90-minute blocks at which we might meet in the coming weeks and reply to this email so that we may schedule a day/time for the interview.

The interview itself will take approximately one hour, will be conducted online over the Zoom web conferencing platform, and all audio/video will be recorded to assist with transcription and coding. For more information, please review the interview-specific information letter attached to this email.

Once we have completed the interview, you will receive a $50 Amazon gift card over email.

Thank you,
Jonathan Lashley, Ph.D. Candidate in Learning Sciences
Clemson University

NOTE: The attached information letter is different than that which was provided previously for the survey. Upon scheduling an interview, you will have consented to the details of this study as they are outlined in the attached information letter.
Appendix C

Questionnaire Adaptation

*I modeled my questionnaire after the one used by Babson Survey Research Group’s nationally representative survey of faculty, Opening the Textbook: Educational Resources in U.S. Higher Education (Seaman & Seaman, 2017), both because of the scale of its use and their reputation for conducting a series of surveys on open education since 2012. Their report and the survey instruments therein are licensed CC BY-SA; the license associated with my questionnaire in Appendix A honors this.

<table>
<thead>
<tr>
<th>Borrowed/Adapted</th>
<th>Unique to My Study</th>
<th>Unique to Babson</th>
</tr>
</thead>
<tbody>
<tr>
<td>Scales</td>
<td>Technical Information</td>
<td>Instructional Style</td>
</tr>
<tr>
<td>I edited prompts to read in the form of a question, but all scales remained the same.</td>
<td>Design Choices</td>
<td>I assumed that the following would come up in interviews (it did).</td>
</tr>
<tr>
<td>Respondent Age</td>
<td>Respondent Age</td>
<td>Course</td>
</tr>
<tr>
<td>Borrowed all questions and variables.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Teaching/Tenure Status/Experience</td>
<td>Order of Scale Variables</td>
<td>Creation/Modification (within two years)</td>
</tr>
<tr>
<td>Borrowed all questions and variables.</td>
<td>Revising Likert scales to maintain the same value from left to right (e.g. Very familiar to Unfamiliar). The number of scale items may have been the same between my instrument and that used by Seaman and Seaman, but the favorable to unfavorable answers may have flipped depending on questions.</td>
<td>So as to winnow scope, the Babson study asks respondents to recount their recent roles in and experience with modifying or creating courses. My population was already winnowed by a specific situation.</td>
</tr>
<tr>
<td>Disciplinary Affiliation</td>
<td>Question-Based Wording</td>
<td>Narrowing responses to focus on new or modified course and/or course with new required materials that has the largest enrollment</td>
</tr>
<tr>
<td>Based on my background in technical design and because my protocol was more focused on interview than validated survey data, any modifications I made were in aid of interviewee experience as an audience.</td>
<td></td>
<td>Several questions prompt respondents to narrow the focus to one course along the following lines. Though</td>
</tr>
<tr>
<td>Role in selecting texts</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&quot;Texts&quot; was used instead of “materials” to narrow scope around reading materials and exclude more abstract supplies.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Instructional Style</td>
<td></td>
<td></td>
</tr>
<tr>
<td>I assumed that the following would come up in interviews (it did).</td>
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</tr>
<tr>
<td>Several questions prompt respondents to narrow the focus to one course along the following lines. Though</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Types of materials assigned in courses
Borrowed description/context exactly; winnowed options to just a few categories.

Licensing of course materials
Licensing of required and/or recommended texts (adapted to include the print vs. digital discrepancy for this question in the Babson survey while including the scale above. These changes open up the line of questioning beyond textbooks to all educational resources.

Important factors in course material selection
Borrowed question and variables.

Satisfaction with current course Materials
Borrowed question and variables.

Understanding of licensing Mechanisms
Adapted to ask about how "familiar" instead of "aware" faculty were of as prompts in their survey. In my instrument, I fashioned all prompts in the form of a question (e.g. "how old are you" instead of "age").

Refining Questions
Cutting questions to keep the survey under 30 lines of questioning (the number of questions in the Babson Survey). Depending on responses about an open textbook, interviewees completed either 28 or 29 lines of questioning in my survey (which would approximately take them fewer than 10 minutes to complete). This choice was made in order to promote more participation and focus on the structure of interviews.

Preferred contact information
For scheduling follow up interviews and for cross reference with OTN contact information.

Textbook-specific questions about the cost to students
Based on the OTN curriculum, I made an educated guess that some of these faculty may not use or have much of a vested interest in textbooks specifically (The open textbook's model arguably works best when a faculty member uses a standard textbook without course pack that can be replaced 1:1 by an open textbook in the OTN's library. Additionally, I wondered whether the faculty would know the cost to students.

Satisfaction with factors (asked about for importance)
It did not seem necessary to survey about this, because their answers about important factors were already going to be brought up in interviews and


borrowed variables.

**Understanding of OER**
Adapted to ask about how "familiar" instead of "aware" faculty were; cited the older Hewlett definition as Babson did.

Did not include the clarifying statement, "Unlike traditionally copyrighted material, these resources are available for ‘open’ use, which means users can edit, modify, customize, and share them" due to its redundancy and wanting to give faculty the benefit of the doubt about borrowed variables.

**Barriers to adoption**
Modified to be specific to open textbooks due to that being the focus of the OTN. Borrowed question and variables.

**Intentions around OER**
Adapted to not be time-constrained to three years like it is in the Babson survey.

about the type of postsecondary institution (OTN programming is designed solely for post-secondary institutions) for which respondents work.

**Understanding of the activities permitted by open licensing**
Offering a potentially more descriptive breakdown of permissions than the more often cited 5 Rs (retain, reuse, remix, revise, redistribute) the following are covered by OTN workshop content at length when discussing open licensing: copying, sharing, editing, mixing, keeping, using

**Familiarity with Open Textbooks (a type of OER)**
Added because this is the focus of the OTN workshop.

**Participation in review of an open textbook from the OTL**
Offered Yes, No, and I don’t remember choices and then additional questions about reasons if Yes or No was selected.

interviewees would be able to provide more nuanced answers about how satisfied they were with the form and function of course materials.

**OER Use**
I assumed that this would come out in interviews more organically and authentically (it did) than it would if respondents self-selected under the questionable understanding of OER:

**Followup**
This was covered in recruitment letters attached to my study and difference expectations were set.
Changes that might spur adoption of open textbooks

Offered scenarios based on relieving the variables mentioned earlier.
Appendix D
Pre-Interview Survey Responses

AB

Age
55+

Gender
Male

Ethnicity
White

Institution type
Four-year institution, Research, Land-grant

Teaching Status
Full-time

Tenure Status
Tenured

Years Teaching
More than 20 years

Modalities taught (in the last year)
Face-to-face course, Online Course

Disciplinary home for teaching
Arts and Humanities, Education, Social Sciences

Role in selecting course texts
I am solely responsible for the selection
Types of texts required/recommended
Textbooks (Required), Articles/Case studies (Required), Academic monographs (Required)

License associated with these texts
Digital/Print Textbooks (Copyrighted), Articles/Case studies (Copyrighted), Academic monographs (No answer)

Important factors for texts

   Extremely Important
      Cost to Student,

   Very Important
      Available in Print Format, Available in Digital Format, Works with LMS

   Moderately Important
      Comprehensive content and activities, Easy to find, Easy to use/navigate, Includes test banks

   Slightly Important
      Adaptable/Editable Content, Recommended by other faculty members

   Not Important at all
      Familiarity with the Brand/Publisher, Includes supplemental materials

Current satisfaction with texts
Somewhat satisfied

Familiarity with licensing mechanisms

   Familiar
      Copyright, Public Domain, Creative Commons

Value of CC-permitted activities

   Extremely valuable
Copying, Sharing, Keeping, Using

Somewhat valuable
Editing, Mixing

Familiarity with the concept of OER
Very familiar

Experience using OER
Have not used OER

Familiarity with open textbooks
Extremely familiar

Reviewed open textbook for OTN
Yes

Motivation to review
The potential to save my students money, The possibility of replacing my current course text(s)

Important deterents for using open textbooks
Not high quality, Not current, up-to-date, Not authored by scholars I know/trust

Factor that could lead to adopting open textbooks
Higher quality texts become available

Likelihood of using OER (not just open textbooks) in the future
Might or might not, because current textbook offerings are of poor quality
BC

Age
55+

Gender
Male

Ethnicity
White

Institution type
Four-year institution

Teaching Status
Full-time

Tenure Status
Tenured

Years Teaching
More than 20 years

Modalities taught (in the last year)
Face-to-face course, Blended/Hybrid course, Online Course

Disciplinary home for teaching
Arts and Humanities, Computer and Information Science, Engineering, Natural Sciences

Role in selecting course texts
I am solely responsible for the selection

Types of texts required/recommended
Other: My own course text and delivery system (Required)
License associated with these texts
Other: Private password website (no answer for license)

Important factors for texts

Extremely Important
Adaptable/Editable content, Available in digital format, Cost to student, Comprehensive content and activities, Easy to find, Easy to use/navigate, Includes supplemental materials, Includes test banks, Other: Being given a Virtual Server

Slightly Important
Available in print format

Not Important at all
Familiarity with the brand/publisher, Recommended by other faculty members, Works with LMS

Current satisfaction with texts
Extremely satisfied

Familiarity with licensing mechanisms

Very familiar
Copyright, Public Domain, Creative Commons

Value of CC-permitted activities

Extremely valuable
Copying, Sharing, Editing, Mixing, Keeping, Using

Familiarity with the concept of OER
Not familiar at all

Experience using OER
Have not used OER

Familiarity with open textbooks
Slightly familiar

Reviewed open textbook for OTN
No

Motivation to not review
The stipend/award associated with a completed review did not seem worth my time, I am happy with my current course text(s)

Important deterrent for using open textbooks
It is difficult to find what I need

Factor that could lead to adopting open textbooks
Clear permission to use or modify

Likelihood of using OER in the future
Definitely yes, because texts cost way too much. My courses have been text-cost free for close to 20 years.
CD
Age
55+

Gender
Male

Ethnicity
Asian or Pacific Islander

Institution type
Land-grant

Teaching Status
Full-time

Tenure Status
Tenured

Years Teaching
More than 20 years

Modalities taught (in the last year)
Face-to-face course, Online Course

Disciplinary home for teaching
Natural Sciences

Role in selecting course texts
I influence the selection, but do not have decision-making power

Types of texts required/recommended
Textbooks (Required)

License associated with these texts
Digital/Print Textbooks (Copyrighted)

Important factors for texts

**Extremely Important**
- Cost to student
- Comprehensive content and activities
- Includes supplemental materials
- Works with LMS

**Moderately Important**
- Adaptable/Editable content
- Available in print format
- Available in digital format
- Easy to find
- Easy to use/navigate
- Familiarity with the brand/publisher
- Includes test banks

**Not Important at all**
- Recommended by other faculty members

Current satisfaction with texts
- Neither satisfied nor dissatisfied

Familiarity with licensing mechanisms

**Familiar**
- Copyright, Public Domain

**Somewhat familiar**
- Creative Commons

Value of CC-permitted activities

**Very valuable**
- Copying, Sharing, Editing, Mixing, Keeping, Using

Familiarity with the concept of OER
- Slightly familiar

Experience using OER
- Have not used OER
Familiarity with open textbooks
Moderately familiar

Reviewed open textbook for OTN
Yes

Motivation to review
The potential to save my students money, The content of the workshop I attended,
The stipend/award associated with my completed review, The possibility of replacing my current course text(s)

Important deterrent for using open textbooks
Not high quality

Factor that could lead to adopting open textbooks
Higher quality texts become available

Likelihood of using OER in the future
Might or might not, because it all depends on whether the material fits my teaching style
DE

Age
55+

Gender
Female

Ethnicity
White

Institution type
Four-year institution

Teaching Status
Full-time

Tenure Status
Tenured

Years Teaching
10–15 years

Modalities taught (in the last year)
Face-to-face course, Online Course

Disciplinary home for teaching
Business Administration

Role in selecting course texts
I am solely responsible for the selection

Types of texts required/recommended
Textbooks (Required)
License associated with these texts
Digital/Print Textbooks (Copyrighted), Articles/Case Studies (Copyrighted)

Important factors for texts

   Extremely Important
   Available in digital format, Cost to student, Includes supplemental materials, Includes test banks, Works with LMS

   Very Important
   Available in print format, Comprehensive content and activities, Easy to use/ navigate,

   Moderately Important
   Easy to find

   Slightly Important
   Adaptable/Editable content, Familiarity with the brand/publisher, Recommended by other faculty members

Current satisfaction with texts
Extremely satisfied

Familiarity with licensing mechanisms

   Very familiar
   Copyright

   Unfamiliar
   Public Domain, Creative Commons

Value of CC-permitted activities

   Not valuable at all
   Copying, Sharing, Editing, Mixing, Keeping, Using

Familiarity with the concept of OER
Slightly familiar

Experience using OER
Have not used OER

Familiarity with open textbooks
Slightly familiar

Reviewed open textbook for OTN
Yes

Motivation to review
The potential to save my students money, The stipend/award associated with my completed review, The possibility of replacing my current course text(s)

Important deterrents for using open textbooks
It is difficult to find what I need, There are not enough options for my subject area, Not high quality, Only digital (no good print options), Lack of ancillary materials (e.g. homework exercises, quiz banks, slide decks, etc.)

Factor that could lead to adopting open textbooks
Other: Probably wouldn't

Likelihood of using OER in the future
Definitely not, because I like the texts I currently use
EF

Age
Under 35

Gender
Male

Ethnicity
White

Institution type
Four-year institution

Teaching Status
Full-time

Tenure Status
Not tenure track

Years Teaching
1–5 years

Modalities taught (in the last year)
Blended/Hybrid course

Disciplinary home for teaching
Business Administration

Role in selecting course texts
I am a member of a group that makes the selection

Types of texts required/recommended
Textbooks (Recommended), Digital Learning System (Required)
License associated with these texts
Digital Textbooks (Copyrighted)

Important factors for texts

Extremely Important
Adaptable/Editable content, Available in digital format, Includes supplemental materials, Includes test banks, Recommended by other faculty members, Works with LMS

Very Important
Comprehensive content and activities

Moderately Important
Cost to student, Easy to use/navigate

Slightly Important
Easy to find, Familiarity with the brand/publisher

Not Important at all
Available in print format

Current satisfaction with texts
Somewhat satisfied

Familiarity with licensing mechanisms

Somewhat familiar
Public Domain

Unfamiliar
Copyright, Creative Commons

Value of CC-permitted activities

Valuable
Editing, Using

Somewhat valuable
Sharing, Mixing, Keeping

Not valuable at all
Copying

Familiarity with the concept of OER
Not familiar at all

Experience using OER
Have not used OER

Familiarity with open textbooks
Slightly familiar

Reviewed open textbook for OTN
Yes

Motivation to review
The stipend/award associated with my completed review

Important deterrents for using open textbooks
Not high quality

Factor that could lead to adopting open textbooks
Higher quality texts become available

Likelihood of using OER in the future
Probably not, because the online digital learning systems we are currently using are so advanced

FG

Age
Gender
Female

Ethnicity
White

Institution type
Four-year institution

Teaching Status
Full-time

Tenure Status
Tenured

Years Teaching
More than 20 years

Modalities taught (in the last year)
Face-to-face course, Online Course

Disciplinary home for teaching
Arts and Humanities

Role in selecting course texts
I am a member of a group that makes the selection

Types of texts required/recommended
Textbooks (Required), Other: Anthology of music (Required)

License associated with these texts
Digital/Print Textbooks (Copyrighted), Anthology of music (Copyrighted)
Important factors for texts

**Very Important**
Cost to student, Comprehensive content and activities, Easy to find, Easy to use/navigate, Familiarity with the brand/publisher

**Moderately Important**
Recommended by other faculty members, Works with LMS

**Slightly Important**
Adaptable/Editable content, Available in print format, Available in digital format

**Not Important at all**
Includes supplemental materials, Includes test banks

Current satisfaction with texts
Somewhat satisfied

Familiarity with licensing mechanisms

**Very familiar**
Copyright

**Familiar**
Public Domain, Creative Commons

Value of CC-permitted activities

**Extremely valuable**
Copying

**Valuable**
Sharing, Editing, Mixing, Keeping, Using

Familiarity with the concept of OER
Moderately familiar
Experience using OER
Have not used OER

Familiarity with open textbooks
Moderately familiar

Reviewed open textbook for OTN
Yes

Motivation to review
The potential to save my students money, The content of the workshop I attended,
The stipend/award associated with my completed review

Important deterrents for using open textbooks
It is difficult to find what I need, There are not enough options for my subject area, Not
high quality, Not used by other faculty I know

Factor that could lead to adopting open textbooks
Higher quality texts become available

Likelihood of using OER in the future
Might or might not, because accompanying anthologies are not available. I'm actually
moving away from a required text altogether, only requiring subscription to the
anthology.
GH

Age
35–44

Gender
Male

Ethnicity
White

Institution type
Four-year institution

Teaching Status
Full-time

Tenure Status
Not tenure track

Years Teaching
10–15 years

Modalities taught (in the last year)
Face-to-face course, Blended/Hybrid course

Disciplinary home for teaching
Arts and Humanities

Role in selecting course texts
I am solely responsible for the selection

Types of texts required/recommended
Textbooks (Required), Multimedia (Required)
License associated with these texts
Textbooks (Copyrighted), Multimedia (Public Domain)

Important factors for texts

Extremely Important
Available in digital format, Cost to student, Easy to use/ navigate

Very Important
Comprehensive content and activities, Easy to find

Moderately Important
Adaptable/Editable content, Available in print format, Familiarity with the brand/publisher, Includes supplemental materials, Recommended by other faculty members

Slightly Important
Includes test banks, Works with LMS

Current satisfaction with texts
Somewhat satisfied

Familiarity with licensing mechanisms

Very familiar
Copyright, Public Domain, Creative Commons

Value of CC-permitted activities

Extremely valuable
Copying, Sharing, Using

Very valuable
Editing, Mixing, Keeping

Familiarity with the concept of OER
Moderately familiar

Experience using OER
Unsure

Familiarity with open textbooks
Very familiar

Reviewed open textbook for OTN
Yes

Motivation to review
The potential to save my students money, The content of the workshop I attended,
The stipend/award associated with my completed review, The possibility of replacing my current course text(s)

Important deterrents for using open textbooks
There are not enough options for my subject area, Concern about updates and keeping content current, Lack of a track record for use in my discipline

Factor that could lead to adopting open textbooks
More become available in my subject area

Likelihood of using OER in the future
Definitely yes, because I am currently developing an Open Textbook for two of my courses. My students need textbooks and the cost and availability in my subject area is deplorable.

HI

Age
Gender
Female

Ethnicity
White

Institution type
Four-year institution

Teaching Status
Full-time

Tenure Status
Not tenure track

Years Teaching
1–5 years

Modalities taught (in the last year)
Blended/Hybrid course, Online Course

Disciplinary home for teaching
Computer and Information Science, Natural Sciences, Social Sciences

Role in selecting course texts
I am solely responsible for the selection

Types of texts required/recommended
Textbooks (Required), Articles/Case Studies (Required), Datasets (Required), Multimedia (Required)

License associated with these texts
Digital/Print Textbooks (Copyrighted), Articles/Case Studies (Public Domain), Datasets (Public Domain), Multimedia (Public Domain)

Important factors for texts

Very Important
Available in print format, Available in digital format, Cost to student, Comprehensive content and activities, Easy to use/ navigate

Moderately Important
Adaptable/Editable content, Includes supplemental materials, Includes test banks, Recommended by other faculty members, Works with LMS

Slightly Important
Easy to find, Familiarity with the brand/publisher

Current satisfaction with texts
Extremely satisfied

Familiarity with licensing mechanisms

Familiar
Copyright, Public Domain

Somewhat familiar
Creative Commons

Value of CC-permitted activities

Valuable
Copying, Sharing, Editing, Mixing, Keeping, Using

Familiarity with the concept of OER
Not familiar at all
Experience using OER
Have not used OER

Familiarity with open textbooks
Slightly familiar

Reviewed open textbook for OTN
No

Motivation to not review
Other: Too many other responsibilities

Important deterrents for using open textbooks
It is difficult to find what I need, Lack of ancillary materials (e.g. homework exercises, quiz banks, slide decks, etc.)

Factor that could lead to adopting open textbooks
Ancillary materials (e.g. homework exercises, quiz banks, slide decks, etc.) are available

Likelihood of using OER in the future
Might or might not, because I really like the book I currently use
Age
35–44

Gender
Female

Ethnicity
White

Institution type
Liberal arts

Teaching Status
Full-time

Tenure Status
Tenure track, not tenured

Years Teaching
6–9 years

Modalities taught (in the last year)
Face-to-face course, Online Course

Disciplinary home for teaching
Arts and Humanities, Languages/Linguistics

Role in selecting course texts
I am solely responsible for the selection

Types of texts required/recommended
Textbooks (Required), Articles/Case Studies (Required), Datasets (Required), Multimedia (Required)
License associated with these texts
Digital Textbooks (Public Domain), Articles/Case Studies (Public Domain), Datasets (Public Domain), Multimedia (Copyrighted)

Important factors for texts

Extremely Important
Available in digital format, Cost to student, Comprehensive content and activities, Easy to find, Easy to use/ navigate, Includes supplemental materials

Slightly Important
Adaptable/Editable content, Familiarity with the brand/publisher

Not Important at all
Available in print format, Includes test banks, Recommended by other faculty members, Works with LMS

Current satisfaction with texts
Extremely satisfied

Familiarity with licensing mechanisms

Familiar
Copyright, Public Domain, Creative Commons

Value of CC-permitted activities

Extremely valuable
Copying, Sharing, Using

Somewhat valuable
Editing, Mixing, Keeping

Familiarity with the concept of OER
Very familiar
Experience using OER
Used as required course materials

Familiarity with open textbooks
Very familiar

Reviewed open textbook for OTN
Yes

Motivation to review
The potential to save my students money, The possibility of replacing my current course text(s)

Important deterrents for using open textbooks
It is difficult to find what I need, There are not enough options for my subject area,
Concern about updates and keeping content current

Factor that could lead to adopting open textbooks
Assurance of current, up-to-date content

Likelihood of using OER in the future
Definitely yes, because they are at lower cost for students and equally good
JK

Age
35–44

Gender
Female

Ethnicity
White

Institution type
Four-year institution, Research, Land-grant

Teaching Status
Full-time

Tenure Status
Not tenure track

Years Teaching
1–5 years

Modalities taught (in the last year)
Face-to-face course

Disciplinary home for teaching
Social Sciences

Role in selecting course texts
I am solely responsible for the selection

Types of texts required/recommended
Textbooks (Required), Articles/Case studies (Required), Multimedia (Required)
License associated with these texts
Print Textbooks (Copyrighted), Articles/Case studies (Copyrighted), Multimedia (Copyrighted)

Important factors for texts

Extremely Important
Available in print format, Comprehensive content and activities, Easy to find, Easy to use/ navigate, Includes supplemental materials

Very Important
Cost to student, Recommended by other faculty members

Moderately Important
Familiarity with the brand/publisher, Includes test banks

Slightly Important
Available in digital format

Not Important at all
Adaptable/Editable content, Works with LMS

Current satisfaction with texts
Somewhat satisfied

Familiarity with licensing mechanisms

Very familiar
Copyright

Somewhat familiar
Public Domain, Creative Commons

Value of CC-permitted activities

Very valuable
Copying, Sharing, Using
Valuable
Keeping

Somewhat valuable
Mixing

Not valuable at all
Editing

Familiarity with the concept of OER
Not familiar at all

Experience using OER
Have not used OER

Familiarity with open textbooks
Moderately familiar

Reviewed open textbook for OTN
Yes

Motivation to review
The content of the workshop I attended, The stipend/award associated with my completed review, The possibility of replacing my current course text(s)

Important deterrents for using open textbooks
It is difficult to find what I need, It seems like too much work, Not high quality, Only digital (no good print options), Not used by other faculty I know, Not authored by scholars I know/trust, Lack of ancillary materials (e.g. homework exercises, quiz banks, slide decks, etc.)

Factor that could lead to adopting open textbooks
Scholars I know/trust author them

Likelihood of using OER in the future
Might or might not, because It depends on the content
Appendix E

Semi-Structured Interview Protocol

*Each prompt anticipates follow up questions for clarification and/or elaboration but also recognizes that follow-up questions may be answered over the course of responding to the main prompt. The highlighted text was updated per interviewee to reflect her survey responses.

1. *Tell me more about your professional background and interests:*
   a. What can you tell me about your professional background?
   b. How do you feel about your current professional standing?
   c. What are your current professional goals/aspirations?
   d. How would you describe your experience teaching at the post-secondary level?
   e. How would you describe your teaching philosophy?
   f. What roles and responsibilities do you have besides teaching?

2. *Tell me more about the institution you work for and those you work with:*
   a. What stands out to you about the institution(s) you have worked for?
   b. How does the structure of your current institution affect you and your work?
   c. How does college leadership (i.e. dean) affect your work?
   d. How does departmental leadership (i.e. chair) affect your work?
   e. How do other faculty affect your work?
   f. How do professional/support staff (i.e. instructional designers, technologists, trainers) affect your work?
   g. How do administrative staff (i.e. schedulers, admin assistants) affect your work?
   h. How do students (i.e. those enrolled in your class, advisees) affect your work?

3. *Tell me more about the course texts that you use/assign:*
   a. How are texts selected for your courses?
   b. Why did you select those particular texts?
   c. How do you utilize course texts in class?
   d. How do you expect your students to use course texts?
4. You indicated that xxxxxx are important and yyyyyy are unimportant when selecting a course text; tell me more about why you feel that way:
   a. Why is xxxxxx important?
   b. Why is yyyyyy unimportant?
   c. How do these qualities relate to your current course texts?
   d. How do xxxxxx and yyyyyy affect your satisfaction with your current course texts?

5. Tell me more about how your course texts are licensed and how that affects you and your students:
   a. How do you license your own work?
   b. What are your thoughts on copyright?
      i. Where did you learn about copyright?
   c. What are your thoughts on public domain?
      i. Where did you learn about public domain?
   d. What are your thoughts on creative commons?
      i. Where did you learn about creative commons?
   e. How do you take advantage of fair use in education?
      i. Where did you learn about fair use?

6. You indicated xxxxxx as (a) valuable permission(s) associated with Creative Commons licensing; tell me more about why feel that way:
   a. How did you come to this understanding?
   b. Who stands to benefit most from these permissions?
   c. How familiar are you with the permissions often referred to as the 5 Rs (Revise, Remix, Retain, Reuse, Redistribute)
   d. Which aspects of the 5 Rs have you utilized in your work?
   e. Which aspects of the 5 Rs would you like to utilize?
   f. Which aspects of the 5 Rs would you not like to utilize?

7. You expressed that you are xxxxxx familiar with OER and that you will xxxxxx use OER in the future; tell me more about why feel that way:
a. Where did you learn about OER?
b. Have you used OER in courses?
c. In what capacity have you used OER?
d. Under what conditions might you consider using OER?

8. You expressed that you are xxxxx familiar with open textbooks, that yyyyy is/are (a) important deterrent(s) to your adopting open textbooks, and that zzzzz might lead you to adopt open textbooks in your courses; tell me more about why you feel that way:
   a. Where did you learn about Open Textbooks?
   b. Have you used Open Textbooks in courses?
   c. In what capacity have you used Open Textbooks?
   d. When might you consider using Open Textbooks?
   e. What informs your understanding regarding deterrents?
   f. What informs your understanding regarding potential adoptions?

9. Tell me more about your experience with the Open Textbook Network:
   a. How did you learn about their visit to your campus and their workshop?
   b. How would you describe your experience participating in the training workshop?
   c. What, if anything, did you earn from participating?
   d. What was the process like for selecting a text to review from the open textbook library?
   e. How would you describe the review process and why you did or did not review?
   f. How would you describe communication with the OTN and your local representative?
   g. What suggestions do you have for the OTN and their library?
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