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A Comprehensive Study of Library-Led Textbook Affordability Initiatives in the United States

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Abstract:

This study presents findings from a survey and interviews investigating library-led textbook affordability initiatives in the United States. The results document diverse considerations and divergences in workflows, challenges librarians face in establishing and maintaining textbook affordability programs, and the intersection of these initiatives with library and institutional strategies. Findings suggest that these programs have grown in number and scale over the past few years, accelerated by the COVID-19 pandemic lockdowns, and are sustained—even without permanent, designated funding—due to consistently positive perceptions about their impact on student success, just-in-time delivery, and alignment with library and institutional goals.

Introduction

It is time to shout it from the mountaintops: libraries buy textbooks! Not only can libraries buy textbooks, but mounting evidence also shows that library provisioning of assigned materials is good stewardship, promotes student learning, and fosters important campus collaborations for

academic libraries.¹ Library-led textbook affordability initiatives are not new; libraries have long provided no-cost alternatives to students in the form of print and electronic reserves and title-by-title purchasing. Thanks to unlimited access e-books and strategic priorities focusing on student success, however, the investment in financial and staff resources to acquire required materials or course curriculum is more formalized and widespread than ever before.

This article reports on a recent survey and companion interviews to pull back the curtain on library-led textbook affordability initiatives across the United States higher education landscape. These initiatives have commonalities but vary in their design, workflows, funding, and connection to institutional and library priorities. The result is the most complete view to date of library-led affordability initiatives, the common successes and obstacles libraries and librarians face in supporting them, how publishers and vendors can help support libraries in making this work more expansive and impactful, and the place of this work in the strategic initiatives of libraries and higher education.

Literature Review

Library Approaches to Affordability

Academic libraries have a long tradition of providing textbooks via course reserves and many programs were specifically built and maintained in response to the increased cost of textbooks.² Libraries budget for course reserves and may consider the purchase of unused materials an opportunity cost for the program as a whole.³ Some course reserve services are offered in conjunction with the campus bookstore.⁴ Print textbook programs have been successful in terms of saving students money, increasing students' academic success, and increasing circulations.⁵ The extent to which print textbook programs met these objectives during and after pandemic lockdowns, however, has been called into question.⁶

Although willing to provide textbooks via reserves, academic librarians have historically been reluctant to add textbooks to their permanent collections. Collection development policies have precluded the purchase of textbooks because they are often expensive, frequently updated, perceived as either too basic or too specific in their appeal.⁷ Librarians with collection development responsibilities have legitimate concerns about how to invest funds strategically and fairly; purchasing all textbooks is beyond the capacity of those with limited budgets and picking selected titles over others poses challenges to fairness.

Changes in the availability of e-textbooks, acknowledgement of their use, quality, and persistence, as well as the embrace of demand-driven collection development approaches have helped establish the value of assigned materials in library collections.⁸ Libraries increasingly purchase textbooks not only for course reserves but for circulating collections and as e-books as part of affordability initiatives attempting to reduce the cost of course materials.⁹ The more precise description might be that libraries buy materials required for courses, including textbooks. Institutional stakeholders engaged in this work, however, find that “textbook” is the term that resonates the most.

E-book textbook affordability initiatives are sometimes paired with Open Educational Resources (OER). Boczar and Pascual advocated that librarians pair both to advance affordability movements.¹⁰ Some OER advocates have been dismissive of textbook affordability initiatives and suggested that including licensed content allows commercial textbook publishers to appropriate the language of textbook affordability for their profit.¹¹ In an affordability landscape shaped by OER and increasingly influenced by library-licensed content there is some tension in how these models can co-exist. Library licensed content provides options for faculty

teaching courses in disciplines where OER has yet to make inroads. In doing so, the library-licensed e-book model allows faculty to retain curriculum choice.¹²

Although most library-led textbook affordability initiatives involve providing licensed e-books for texts assigned in courses, some programs have detailed their idiosyncratic approaches on library websites or in the literature. The University of Wisconsin-Stout, for example, has an instructional resources unit in their library that negotiates with vendors to provide all course materials directly to students. The program is funded through student fees: “UW-Stout students pay a rental fee included in their tuition based upon the number of credits taken.”¹³ The Access Services department of the library at Bowling Green State University functions as the de facto campus bookstore; library staff receive adoptions from faculty and manage the campus textbook database, providing purchase options to students when content is unavailable for licensing or course reserves.¹⁴ The University of Maryland University Libraries’ Top Textbooks is unique in its focus on print materials; their program prioritizes high enrollment courses and acknowledges that traditional textbooks are most often unavailable for libraries to license as unlimited user e-books.¹⁵ The North Shore Community College works around the lack of availability of commercial textbooks using a three-pronged approach to course reserves: licensing e-books that are available, providing access to selected digital textbooks via the BibliU platform, and leveraging controlled digital lending (CDL) to provide time-limited loans of digitized print textbooks for the remaining content.¹⁶

Library Workflows

Workflows for textbook affordability initiatives are complex, in part because they can cross many departmental lines. Librarians have shown that OER and textbook affordability ecosystems in libraries include departments and services such as: acquisitions, collection

development, copyright education, course reserves, digital repository, discovery, information literacy, library administration and operations, metadata, open textbook publishing, outreach, reserves, research, research and productivity tools, and teaching and learning.¹⁷ Depending on local workflows, these departments support the end-to-end process from identifying required materials for purchase to notifying faculty and students of library supplied no-cost options.

Librarians have documented their processes for searching for and otherwise identifying assigned materials. In some instances, the bookstore is a partner in textbook affordability programs and supplies textbook data.¹⁸ Administrative support for library and bookstore partnerships can lead to practices in support of affordability; Franklin University, for example, made a top-down decision that faculty cannot require students to buy any text provided by the library.¹⁹ Although the bookstore is the most common source of textbook data and an occasional partner, librarians have documented a variety of other sources for gathering imperative textbook data, including enrollment systems, faculty requests, syllabi, and the office of the registrar.²⁰

The degree to which commercial bookstores offering “inclusive access” programs can be perceived as partners is questionable due to reported difficulties related to students easily opting out, privacy concerns, and the actual savings afforded to students.²¹ Inclusive access programs provide all assigned course materials and automatically add their cost to a student’s tuition and fees. Additional concerns about inclusive access programs include an increase to overall student debt without their realizing it, disincentivizing OER adoption, the subsidization of expensive course materials by students in disciplines with less expensive costs, concerns around the digital divide, and the exclusion of library-led affordability initiatives.²² Independent bookstores are more likely to approach textbook provisioning in cost-neutral ways.²³ The U.S. Department of Education recently issued a proposal that would prevent institutions from automatically billing

for books and supplies; although commercial bookstores may have the most to lose in this proposition, some institutions have also registered their concerns.²⁴ One way around this may be for the university to absorb textbook costs rather than bill students and rely on commercial bookstores to manage the distribution process.²⁵

The literature also documents mechanisms for automating elements of textbook affordability initiatives, including process improvements for identifying available textbooks. Scott, for example, shared a process for using Python and the pymarc library to match assigned textbooks with those available in the library's collection.²⁶ Lounsberry documented how Louisiana State Library uses a Python script to identify matches between the bookstore textbook list and interlibrary loan data in the wake of changing policies that allowed for the request of textbooks by students.²⁷ Blanchard and Carlson reported their use of a Fuzzy Lookup add-in for Excel to facilitate comparing bookstore and library textbook data.²⁸ They also make use of ProQuest's ordering platform Rialto, which is integrated within Alma, to compare books currently owned and available to purchase.

Funding

Several institutions indicate that textbook affordability initiatives are not funded through a single or permanent source. At East Carolina University, for example, they are funded through a combination of "special library monies, the traditional book budget and grant funding."²⁹ Soules indicated that textbooks had previously been funded by grants and are now funded through student fees.³⁰ Clamon, Sergiadis, and Young documented the support of 90 percent of students and 92 percent of faculty to fund their pilot project using student library fees and departmental funds, respectively.³¹ Blanchard and Carlson detail their collaboration with the Northern Arizona University Development office to organize a library-led textbook affordability

crowdfunding challenge; the campaign raised \$7,500 and was supported primarily by current employees (43 percent) and university alumni (35 percent).³²

Vendor Issues

Librarians and publishers have discussed the opportunities and challenges of licensing e-books as textbook replacements. Some textbook affordability initiatives incorporate subscription materials, while others do not.³³ There was an outcry from librarians serving higher education in 2022 when Wiley removed over a thousand, highly used e-books from subscription collections during the academic year.³⁴ Several studies have noted the scarcity of textbooks available as e-books with an unlimited user license.³⁵ Due to this shortage, some librarians include limited user licenses under certain circumstances. Linoski, Slutskaya, and Holdsworth document their order of preference for e-book license models as: DRM-free, unlimited user, multiple user, and non-linear.³⁶ In discussing the shortcomings of limited user licenses, Sotak et al. note workarounds to “make the material as accessible as possible.”³⁷ Where possible, they disable checkouts for single user e-books so that no single user could inadvertently prevent others from accessing them.

The availability of institutional licensing for e-books has changed considerably in recent years. Aggregators such as EBSCO and ProQuest have long offered e-book collections to library customers, but publishers such as Cambridge University Press and Wiley, increasingly promote e-textbook collections curated to serve the curriculum. In addition to publishers from which libraries have long licensed content, traditional textbook publishers including McGraw-Hill now offer subscriptions such as AccessEngineering, that include not only textbook content, but also exam prep, outlines, and other interactive tools.³⁸ Considering that faculty, not librarians, select textbooks, these packages may offer more content rather than the right content. Additionally,

platforms built for individual use, such as BibliU, RedShelf, and VitalSource, now also offer institutional licensing.

Library and Institutional Strategy

Libraries that cannot afford to collect comprehensively make strategic decisions about the purpose and nature of their collections. Increasingly, textbook affordability initiatives are understood to support student success, equity, diversity, and inclusion, and patron-driven strategies. The Association of College and Research Libraries reported that 82 percent of respondents “support textbook affordability initiatives” as an EDI-related activity.³⁹ The success of patron-driven and just-in-time acquisitions has been well-documented in the literature and textbook affordability via e-book licensing is certainly one method of “giving ‘em what they want.”⁴⁰ Several studies have indicated that textbook affordability initiatives are an important means of aligning library collections to student needs.⁴¹ These initiatives often become the bridge that can link the dual priorities of pursuing patron-driven or “just in time” acquisitions and student success.

Some articles have explicitly linked the work of their textbook affordability initiative to student success. Librarians have linked library provision of textbooks to inclusive and equitable pedagogical practices.⁴² Many studies have made the connection between student success and savings offered by textbook affordability initiatives.⁴³ Murphy and Shelley highlight opportunities to learn from COVID lockdowns and more proactively support student affordability: “Sometimes major upheavals provide an opportunity for change that would otherwise have been impossible. As a profession, we must seize this opportunity to push for more affordable textbook access.”⁴⁴

Most of the literature on library-led textbook affordability initiatives is specific to a single institution. Although such case studies have been helpful in normalizing initiatives and sharing local processes, they have not demonstrated the state of initiatives at diverse institution types across the United States. This article fills a gap in the literature by offering the first multi-modal study conducted with academic librarians throughout the country. The authors leverage the rich data to explore three research questions, namely: How do library workflows for textbook affordability programs vary and what are their primary considerations, what obstacles do librarians encounter in providing textbooks to students, and how do library-based textbook affordability initiatives align with library and institutional strategic initiatives?

Methods

This study presents findings from a survey and interviews conducted with academic librarians at a variety of institution types throughout the United States. The study was approved by the Illinois State University Institutional Review Board as exempt and the complete survey and interview instruments are provided in appendix 1 and 2, respectively. The authors distributed the Qualtrics survey on professional forums and email discussion lists (see appendix 3) and randomly selected one hundred Carnegie doctoral, masters, baccalaureate, and associate institutions in which to email the survey. This step was taken to promote the participation of librarians at community colleges and libraries with smaller staff whose experiences are frequently omitted from the scholarly record. The survey ran from October 25 through November 17, 2023. Respondents interested in participating in an interview were invited to share their email address in a separate form. All participants who expressed interest were invited to interview.

The authors conducted twenty-two in-depth, semi-structured interviews with twenty-five librarians who identified as participating in a library-led textbook affordability initiative. Throughout this study, the term librarian will be used to describe any library employee, faculty will be used to describe any instructor of record, textbook will be used for any text assigned in a course, and textbook affordability initiative refers to programs in which the library provides students cost-free access to textbooks. The interviews, which lasted from fifty to eighty minutes, were conducted via Zoom in January and February 2024, and recorded with participant consent. Each survey participant was offered a \$25 Amazon gift card. During the interview, both authors took notes and later reconciled them, confirming quotations in the transcripts. The authors employed naturalistic inquiry, in which “data processing is a continuously ongoing activity, making possible the meaningful emergence or unfolding of the design and the successive focusing of the study.”⁴⁵ This means that responses offered by a particular participant shaped the direction of their interview and informed future interviews and the analysis conducted. The authors used inductive coding to organize the data into themes and sub-themes.

To promote the validity of the findings, the authors followed procedures outlined by John W. Creswell and Dana L. Miller.⁴⁶ Their postpositivist paradigm involves triangulation, where researchers search for convergence among different sources; member checking, where participants review the data and interpretations; and the audit trail, where professionals external to the project consider the credibility of the account.⁴⁷ Survey and interview data are triangulated with existing literature in the results section. The authors invited interview participants and professionals external to the project to provide input on a draft and incorporated their feedback into the manuscript.

Limitations

The authors have led textbook affordability initiatives at multiple institutions and accordingly come to the topic as practitioners committed to reducing student costs associated with textbooks. That the authors are not dispassionate observers can be seen in the survey and interview questions; for example, by asking about library and institutional strategy, the authors may be perceived as suggesting that textbook affordability should be a strategic direction. Further, the authors conducted the interviews themselves and some of the participants were known to one or both authors. Despite taking steps to engage librarians in a variety of institutional settings, participants from doctoral universities are overrepresented.⁴⁸ Finally, this manuscript only includes perspectives of librarians who actively support textbook affordability initiatives and not those who have not been able to launch a program or participated in projects that have not continued. Accordingly, the authors cannot identify or explain reasons that textbook affordability programs fail to launch or are ended.

Results & Discussion

The survey received 140 responses, of which 96 were included as valid. Responses were deemed valid when the respondent indicated that their library supports an e-book textbook affordability initiative. Not all questions were required, however, and some questions have fewer than 96 responses. Respondents represent a variety of institution types and have wide ranging library materials budgets.

Table 1. Survey Respondents by Institution Type.

Institution Type	Survey Respondents
Baccalaureate College	12
Community/Associates College	12
Doctoral University	45
Master's College or University	21

Other	3
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Table 2. Survey Responses by Total Library Materials Budget Allocations

Total Library Materials Budget Allocations	Survey Respondents
Less than \$500,000	33
\$500,001 - \$1,000,000	16
\$1,000,001 - \$3,000,000	16
\$3,000,001 - \$5,000,000	9
\$5,00,001 - \$8,000,000	5
\$8,000,001 - \$11,000,000	7
\$11,000,001- \$15,000,000	6
Over \$15,000,001	2

The interview participants similarly represented a variety of institution types. Of the twenty-two unique institutions represented, there were thirteen doctoral universities, four baccalaureate colleges, two community colleges, two private, non-profit health-focused institutions, and one master’s university. Of the twenty-five interview participants, seven were responsible for collections, acquisitions, or technical services; six were sole librarians or directors; two were in access services or resources sharing; one was in distance services; one was a reference and instruction librarian; one was a systems librarian, and one led scholarly communication. Two participants have positions specific to their institution’s support for affordable materials. Four participants from one institution participated in the same interview;

their library has a longstanding affordability initiative that depends on the work of individuals across library departments.

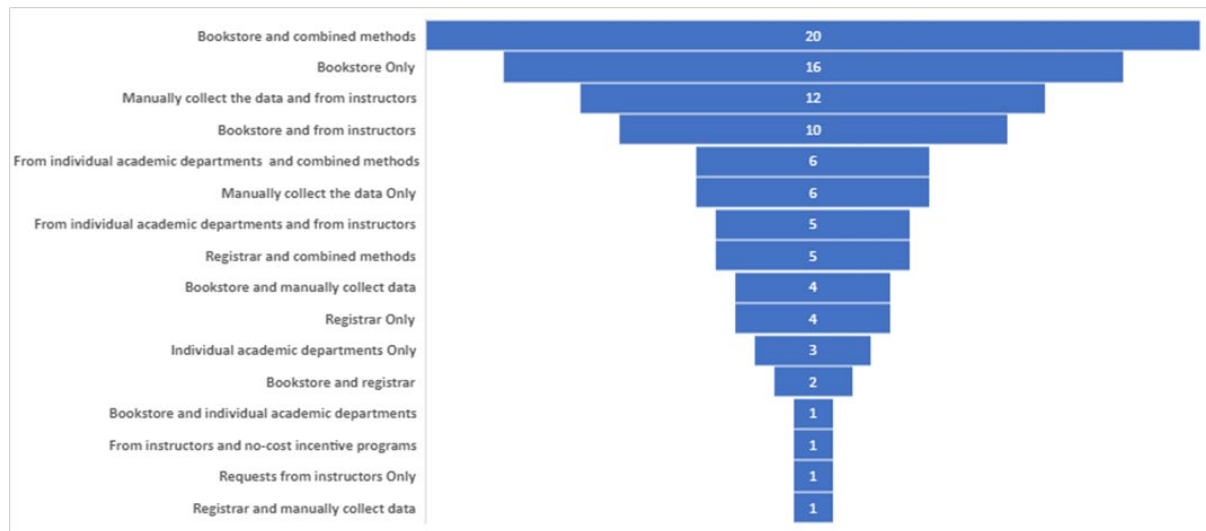
RQ1. How do library workflows for textbook affordability programs vary and what are their primary considerations?

The survey and interview results demonstrate that workflows for textbook affordability programs are divergent, composed of multiple steps, informed by local and historical practices, and subject to continual refinement.

Obtaining Textbook Data

Obtaining a list of required texts for the upcoming semester is essential to textbook affordability initiatives; only when those data are in hand can the process begin.

Figure 1. How do you obtain textbook data?



As demonstrated in figure 1, the most common source for textbook data is the campus bookstore. Many libraries have developed a partnership with the bookstore and have an agreement in place for textbook data to be shared prior to the start of the semester. Although the bookstore is the

most common source of this data, it was the exclusive source for only 16 percent of respondents. Rather, 55 percent of respondents routinely pair bookstore data with a combination of other methods to create as accurate and comprehensive a textbook list as possible. Other methods include manual data collection from the bookstore website or course offering pages, no-cost incentive programs, and obtaining lists from faculty, academic departments, or the registrar and other institutional offices. More than a third (36 percent) of survey respondents rely on two of these options and 31 percent rely on a combination of three or more of these methods to build their textbook lists. The variations in methods for obtaining textbook data are also reflected in the amount of time librarians invest in this process—from one to five hours to over 30 hours—as indicated in table 3, and how far in advance they initiate the process—from “a few months in advance” to after classes start—as indicated in table 4.

Table 3. How many hours are needed to compile the data?

How many hours to compile the data?	Responses	% of responses
1-5 hours	32	33.68%
6-15 hours	34	35.79%
16-30 hours	17	17.89%
More than 30 hours	12	12.63%
Grand Total	95	100.00%

Table 4. How far in advance of the semester do you get the data?

How far in advance to you get the required materials data?	Responses	% of responses
1-2 months	28	31.11%
3-4 weeks	24	26.67%
2 weeks	15	16.67%
Varies by semester	10	11.11%
1 week or less	8	8.89%

After classes start	4	4.44%
3 months or more	1	1.11%
Grand Total	90	100.00%

Interview responses added nuance to the complications encountered in the process of obtaining this data. Librarians rely on multiple sources of information because faculty frequently do not report textbook adoptions in a timely manner, despite federal law mandating that information about textbook adoptions and costs be available to students.⁴⁹ Librarians at one institution indicated that only around 10 percent of courses have a textbook assigned and several others reported low adoption numbers. Even though faculty are given deadlines for submitting required textbooks to the bookstore for an upcoming semester, lists frequently become complete only as the semester approaches; this is problematic for librarians whose complex workflows rely on these lists. As indicated in table 4, 25 percent of libraries get the list one to two weeks in advance and 4 percent get the list after the semester has started. In many interviews, librarians reflected on the challenge of finding a “sweet spot” in which the adoptions are as complete as possible while also allowing sufficient time for the library workflows to be completed.

Librarians use a variety of strategies to navigate the limitations of bookstore data. One institution worked with the bookstore to generate an automated textbook list that is emailed daily; allowing librarians to act on the list multiple times. A few participants indicated that they check the bookstore data for changes numerous times in preparation for a new term. Several participants have invited faculty to submit required textbooks directly to the library. These opt-in approaches are designed to supplement the bookstore lists and, in some instances, to be used exclusively. Opt-in approaches not only emphasize faculty consent and choice, which have been perceived as crucial to the success of textbook affordability initiatives, they also save the time of librarians who would otherwise engage in manual collection and/or searching. One librarian

shared how they had previously searched every syllabus for assigned textbooks when they became available two weeks before the semester and then quickly purchased what they could: “It would incite a scurry when all of a sudden, we’d get the flood of syllabi. [...] The beginning of the semester is already stressful enough.” Switching to an opt-in approach allows librarians to work more efficiently and with the reassurance that they are acting with the support of their faculty.

Partnering with the bookstore supports librarian participation in textbook affordability initiatives, but interview participants noted that this partnership cannot be taken for granted. One participant shared that new management in the bookstore meant a loss of access to bookstore data. Instead of ending the initiative, they manually harvested data from the bookstore website: “we weren’t going to stop.” Interviewees at institutions with an independent or non-profit bookstore boasted that managers were happy to share textbook data. A few participants mentioned that they have requested lists from the for-profit campus bookstore and were denied. Interestingly, the same companies that have refused requests at some campuses are willing to provide lists at others, suggesting differing practices arbitrated by individual managers rather than a corporate mandate not to share textbook adoption data. To contend with the lack of sharing, one director has student workers manually copy and paste textbook information from the campus bookstore’s website into a spreadsheet. On the opposite end of the spectrum, a few interview participants have not only been given the textbook data, but also granted access to the bookstore’s textbook adoption platform. One shared that their bookstore manager had been happy to give them backend access, quipping: “I don’t make money from textbooks; I make it from sweatshirts.”

Librarians on campuses without a bookstore or with a bookstore that does not sell textbooks often fulfill the responsibility of textbook provision; four interview participants reported such models. One of these librarians leads a unit of three people to receive adoptions for campus courses and negotiate directly with publishers to license all content; this is the most comprehensive program. One participant leads an access services unit to receive all adoptions and administer a campus textbook database that provides access options including content available from the library and content available for individual purchase on third party platforms. The third and fourth participants reported that their campus bookstore no longer manages textbooks and that they have access to the Akademos platform on which textbooks are adopted and purchase options are made available to students.

Cleaning or Verifying Data

Survey respondents and interview participants called into question the accuracy and completeness of the textbook data they receive. In the survey about half of the respondents indicated they verify data only when there is an obvious discrepancy, missing information, or need to discuss pricing and licensing options. Several respondents highlighted issues around textbook editions, for example: “There are some faculty who do not care about edition, and that is a time-intensive aspect to investigate” and “If there is a newer edition, we alert program directors and/or instructors and ask them if they want to adopt the newer edition.” One respondent reported following up with faculty who have adopted a zero-cost text: “Our faculty often report ‘no text required’ to the bookstore when they have adopted a zero-cost book. We verify with these faculty.” The variations in practices are reflected in table 5, with most respondents spending fewer than five hours, but 10 percent spending over thirty hours on cleaning or verifying textbook data.

Table 5. How many hours are spent verifying the data?

Hours verifying data	Responses	% of responses
1-5 hours	27	69.23%
6-15 hours	6	15.38%
16-30 hours	2	5.13%
More than 30 hours	4	10.26%
Grand Total	39	100.00%

Searching for Available Textbooks

Most survey participants include previously licensed or purchased content in their textbook affordability initiatives. Comparing textbook adoptions against library holdings can be an onerous task and is one step that several librarians have attempted to automate or at least speed up via batch processes. Table 6 shows the numbers of hours respondents take to match textbook adoptions to content that is available via library collections. Although most spend fewer than fifteen hours, almost 30 percent indicated that over sixteen hours are spent matching textbooks every term.

Table 6. Hours needed to match textbook data to already licensed content.

Hours matching to already licensed content	Responses	% of responses
1-5 hours	25	32.05%

6-15 hours	30	38.46%
16-30 hours	12	15.38%
More than 30 hours	11	14.10%
Grand Total	78	100.00%

Interview participants provided a variety of reasons why the matching process takes so long. Several participants search manually, some using the public interface of a library catalog. Although many integrated library systems can be searched in bulk, the quality of the results relies on the accuracy of the textbook data, the comprehensiveness of the library’s metadata, the limitations of the system, and the usability of the system output file for matched content. Even for libraries using the same integrated library system there are workflow variations. One participant indicated that their metadata librarian colleague runs an overlap analysis in Alma to facilitate matching while another librarian reported using Alma Analytics for this process. Another Alma library with a long-standing program has had time to refine and further automate matching processes within Alma; although they previously used an API to match textbooks, they now run a SRU (Search/Retrieval via URL) query.

Despite the efficiencies created by batch searching, many librarians reported spot checking or including a manual search process alongside their automated process because “it always misses some.” A librarian at a larger research library worked with their Office of Institutional Research to develop a Python script that identifies owned and subscribed content. They also work with a cataloger to search Alma and “find some additional titles,” reiterating that quality assurance is essential to the process. Although some institutions have built automations and workflows to leverage their systems and improve the matching process, interviewees with

large e-book holdings reported that the process often lacks important metadata around e-book license type (e.g. perpetually owned, subscribed, unlimited license, DRM-free license, and limited-user license). This information is necessary when evaluating which already-licensed content to include in these initiatives and it can only be gathered with a manual process.

Funding Purchases

A majority (61 percent) of survey respondents fund textbook affordability initiatives with existing collection budgets alone (table 7). Another 30 percent rely on the collection budgets plus a combination of other funds. Only 6 percent rely exclusively on a single non-collections budget funding source.

Table 7. How do you fund your initiative?

How do you fund your initiative?	Responses	% of responses
Collections (materials) budget only	51	61.00%
Collections (materials) budget & Endowments	9	11.00%
Collections (materials) budget & External grant funding	5	6.00%
Collections (materials) budget & Institutional grant funding	4	4.81%
Endowments only	2	2.40%
External grant funding only	2	2.40%
Bookstore Funds or Textbook sales (Library as Bookstore model)	2	2.40%
Collections (materials) budget & Student organizations	2	2.40%
Collections (materials) budget & Institutional grant funding & External grant funding	2	2.40%
Institutional grant funding only	1	1.20%
Collections (materials) budget & Endowments & Institutional grant funding & Student organizations	1	1.20%
Collections (materials) budget & Bookstore Funds or Textbook Sales	1	1.20%
Collections (materials) budget & Internal Grant Funding	1	1.20%
Grand Total	83	100.00%

Interview participants reported some commonalities in the funding and expenses related to their projects. For example, several indicated that their overall spending had decreased after an

initial period of purchasing and building an inventory of textbooks. In rare instances, libraries have received additional collection funding to support these programs, but most have carved out dollars to support them from existing collection budgets. In transitioning money to support these programs and in making the case to internal and external stakeholders about these programs, participants commented on treating these initiatives as new collection development strategies.

Several interviewees made the point that these initiatives exemplify libraries' ongoing shift towards "just in time" purchasing and represent a better use of money than purchasing "just in case." Several interviewees commented that with monograph purchasing at an all-time low in libraries, they have shifted remaining firm allocations in this strategic direction. Some participants stated that they see these initiatives as extensions of other patron or demand driven acquisition (PDA or DDA) methods and another way to connect library users to a stated need. Borrowing from the patron-driven language, one library has distilled this into a collection strategy that they have branded as "curriculum driven acquisitions." Just as PDA became synonymous with user-centered collection development, curriculum driven acquisitions could serve a similar role for these curriculum focused strategies.

For many, supporting these initiatives with the collection budget alone is not a reality due to flat or decreasing budgets. One interviewee commented that not funding their program from the collections budget was "not a philosophical decision, just purely economic." Despite financial obstacles, many interviewees commented that these initiatives created opportunities to connect to other library strategic priorities, like diversifying the collection and making it more inclusive. One participant indicated that they could use funds dedicated to supporting the purchase of diversity, equity, and inclusion-related materials because many of the required materials in courses fit into this category. They noted that when faculty intentionally diversify

course content and their syllabi and the library purchases these materials, it contributes to diversifying the overall collection.

Some participants shared that affordability initiatives make successful fundraising ventures and attract donor support. For example, two participants reported success in working with their Offices of Advancement to generate sustainable funding via institutional annual day of giving events. Interviewees also reported successes in obtaining funding by partnering with student government, receiving funding from offices of the provost or academic deans, and redirecting non-collection endowments or gift funds at the discretion of library administration. Of course, relying on discretionary funds from internal or institutional partners comes with its own pitfalls; interviewees reported that funding sources had changed and even been lost over time. When funding dried up, participants reported suspending purchasing but continuing to notify faculty of e-books that were already licensed or owned.

Licensing New Texts

Survey results show that purchasing and activating e-books may require more staff time than other elements of the workflow. Table 8 shows that 33 percent of survey respondents reported spending more than sixteen hours on this process and 14 percent reported spending more than thirty hours. Although many interviewees reported the ability to batch search for assigned textbook ISBNs in the vendor platform of their choice, participants were more deliberate when purchasing materials. Slower and more considered decisions are appropriate when faced with multiple vendor purchase options and their varying costs and user models.

Table 8. Hours to purchase and activate e-books.

How many hours to purchase and activate e-books?	Responses	% of responses
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Less than 1 hour	6	7.23%
1-5 hours	25	30.12%
6-15 hours	24	28.92%
16-30 hours	14	16.87%
More than 30 hours	14	16.87%
Grand Total	83	100.00%

Because licensing everything is neither possible nor sustainable, interview participants articulated a variety of considerations when acquiring new e-books:

- *License options* (“Buy what is available as unlimited and use Bibliu as another option”; “Have paired 1 user model with a non-linear model to provide additional access [...] if one is in use, it goes to linear.”)
- *Subscribed versus owned* (“Will use a subscribed title but might buy a perpetual license if continually assigned.”)
- *Item cost* (Cost thresholds depend on total budget for the program but also function at the title level, “If an e-book costs four-times more than the print, we won’t buy it.”)
- *Item adoption history* (i.e., the history of having been previously assigned and number of times)
- *Item status* (e.g., whether it is required, supplemental, or recommended)
- *Course enrollment* (“We will buy 1-user and 3-user models depending on enrollment and conversations with faculty,” or, “We will not purchase if enrollment is under 25 but are thinking of dropping this criterion.”)
- *Course type* (e.g., general-education designation, upper or lower-level course)
- *Faculty interest* (“We contact faculty in advance of purchasing to verify interest.”)
- *Subject librarian input* (Especially when the collections budget funds textbooks)
- *Platform, discovery, and access* (“We avoid buying EBSCO e-books due to platform and user experience.”)

Interview participants offered conflicting thoughts on whether to use limited user e-book models and if they were used, how to strategically deploy them. For some librarians, the question of which e-book user models to include is an easy one: they rely exclusively on unlimited access. The question of access versus ownership also yielded divergent practices. Some participants are

not willing to include subscribed content, perhaps after having been burned by the removal of texts mid-term. Most participants, however, are willing to include subscription content if perceived as stable. Although several participants do include subscription e-books in their program, most will not pursue a new subscription collection for their program and seek out individual titles instead.

Some participants found limited user models could serve as viable alternatives when purchased in quantity, for courses with lower enrollments, or for specific types of materials, such as novels, that were less likely to be a student's sole method of access. One librarian indicated that if they purchase a limited user license, they purchase one for every student enrolled. This has meant purchasing up to twenty-two single-user copies of a title. Another participant reported purchasing six single-user copies for an online course with an enrollment of over 200 students. They monitored turn-away rates to evaluate whether these copies were sufficient, and they saw none, suggesting that individual user models—when purchased in quantity and monitored—can meet user needs. Librarians also reported working within DDA frameworks to leverage this model's potential cost saving by its ability to deliver more expansive access only when necessitated by user demand.

Providing Access and Notifying Users

Much like the process of gathering textbook data, the notification process is also multifaceted and complex. This is evident in the amount of staff time dedicated to the notification process and the number of methods librarians employ to make faculty and students aware of these initiatives and the textbooks available to them.

Table 9. Hours of library personnel time spent contacting instructors and students or using other strategies to make e-books available per semester.

How many hours to contact and embed e-books in LMS?	Responses	% of responses
Less than 1 hour	6	7.23%
1-5 hours	31	37.35%
6-15 hours	25	30.12%
16-30 hours	9	10.84%
More than 30 hours	12	14.46%
Grand Total	83	100.00%

Table 10. How are faculty and students notified of available textbooks.

How are faculty and students notified that the library has an e-book available for their course?	Responses
Instructors are notified via email only	23
Instructors are notified via email & e-book links are embedded in learning management system course pages & Titles are announced on a library webpage or LibGuide	16
Instructors are notified via email & e-book links are embedded in learning management system course pages	14
Instructors are notified via email & Titles are announced on a library webpage or LibGuide	10
Instructors are notified via email & course reserves	5
Instructors are notified via email & e-book links are embedded in learning management system course pages & course reserves	5
No notification occurs	2
e-book links are embedded in learning management system course pages & Titles are announced on a library webpage or LibGuide	2
e-book links are embedded in learning management system course pages	2
Instructors are notified via email & Titles are announced on a library webpage or LibGuide & course reserves	2
Instructors are notified via email & e-book links are embedded in learning management system course pages	1
Instructors are notified via email & e-book links are embedded in learning management system course pages & bookstore advertising	1
e-book links are embedded in learning management system course pages & syllabi	1

Instructors are notified via email & Titles are announced on a library webpage or LibGuide & students notified via email	1
e-book links are embedded in learning management system course pages & Titles are announced on a library webpage or LibGuide & students notified via email	1
Grand Total	86

As seen in table 9, most respondents spend less than fifteen hours a term on the tasks related to notifying and connecting faculty and students to these resources. Over a quarter of respondents spend sixteen or more hours on the tasks which demonstrates that this is not necessarily as simple as posting a list of available textbooks online or executing a mail merge. Table 10 outlines a variety of mechanisms for notifying and providing access to these materials, and once again shows that participants frequently combine approaches, not settling for a single method. Most respondents (78 percent) email faculty directly, but many do so in addition to embedding links in the campus LMS, course syllabi, campus bookstore platforms, making a list digitally available, and/or leveraging course reserves systems.

Interview participants discussed their approaches in detail, providing a variety of rationales for their decisions, and explained how their approaches had evolved over time. One library with a decade-old initiative found that their usage went up dramatically only after contacting faculty directly; they previously maintained a database of assigned textbooks only. This participant’s takeaway: “Contact faculty directly.” For several participants, contacting faculty is a manual process, but many indicated using mail merge to generate their emails. One interview participant mentioned using Microsoft Power Automate to send notifications to faculty.

Participants mentioned shifting from one email per textbook to one email per faculty member, instead bundling textbooks from across all their courses. These emails are typically sent before the term begins, but the timing depends on the overall approach. Some participants

differentiate email messaging to reflect license types and other considerations. Although many emails include title information and links to content specific to the professor, some link out to a textbook database. Direct contact with faculty helps ensure that everyone is on the same page. One participant evoked the game of “Whac-A-Mole” to describe the inevitable scenario of scrambling to keep up with late textbook adoptions and purchasing items that students or faculty thought were available through the library when they were not. A few participants shared that their program operates only with faculty consent and no additional notification is necessary; participating faculty agree to share the links with students directly.

The extent to which Course Reserves are part of this process—and affordability initiatives more broadly—is worth discussion. Interview participants at ten institutions articulated a role for course reserves in their initiative; however, twelve institutions do not currently involve course reserve personnel or processes in this work. Although the provision of textbooks has historically been the purview of course reserve, several textbook affordability workflows circumvent course reserves to notify faculty and provide access directly. When the topic came up in discussion, some participants who do not work with course reserves reflected on the siloed nature of their libraries. One was more emphatic on their choice to delineate the separation of this work from course reserves, saying: “Course reserves are dying.”

Although the death of course reserves is debatable, new Reading List Management systems may allow librarians to play different roles in managing faculty and student access to assigned content. Several interviewees reported that their institution was considering or had recently implemented Reading List Management systems such as Leganto and Talis and saw these as the next generation of tools needed to create better access, LMS integration, and analytics for the curricular integration of library-supplied assigned materials. One interviewee

who had previously used the Springshare E-Reserves module recently adopted the Kortext product KeyLinks for this purpose.

For other participants—especially those at which textbook affordability initiatives are based in access services or similar units—course reserves are integral to the entire workflow. . Course reserves services have traditionally relied on faculty opting-in; however, some participants suggested that was not sufficient reason to preclude more proactive approaches via course reserves. One participant has branded their approach as Proactive Course Reserves, which builds on existing library infrastructure and services to embrace textbook affordability at a larger scale. One community college participant shared that a college administrator did not think textbook affordability work was the purview of librarians but has not intervened with the libraries’ robust “Digital Course Reserves” program.

Assessment

Assessing textbook affordability initiatives is something that many participants indicated that they would like to expand on. For those that do not have time to both run the program and assess it, they prioritize running it. Those who are engaged in assessment most commonly calculate potential students cost saving by multiplying course enrollment by the cost of textbooks. Some also factor in the cost of the resources to the library to show that minimal library expenditures can save students a great deal. Such calculations, however, come with a long list of caveats, including: which student purchasing cost to use (e.g. new, used, or rental), the date on which enrollment data is pulled, the reality that many students do not purchase even required textbooks, and the question of whether the library’s provision of a text—even one with an unlimited user license—means that students will use it instead of purchasing a copy.

Several participants noted that assessing usage is tedious as it involves collecting usage for individual titles distributed across a variety of vendor platforms. Much like the issues faced in the purchasing step of the workflow, librarians who manage these initiatives from outside of collections and acquisitions also reported challenges in getting the collection of usage for these initiatives prioritized and into the usage collection workflow. As a result of complications in collecting the data, not having access to the data, or not having data collection prioritized, many participants indicated that they do not currently assess usage data.

Project Management

For most institutions, textbook affordability work often crosses library departments and relies on cross-institutional partners.

Table 11. Library staff involved in the initiative.

How many staff members are involved?	Responses	% of total responses
1 staff member	11	13.25%
2 staff members	13	15.66%
3 staff members	24	28.92%
4 staff members	11	13.25%
5 staff members	7	8.43%
6 staff members	8	9.64%
7 staff members	4	4.82%
8 staff members	3	3.61%
9 staff members	2	2.41%

As seen in table 11, workflows involving three staff members are the most common but 71 percent of these initiatives involve the work of three or more library staff and 29 percent involve the work of five or more library staff. The most common library departments engaging in this work include collections and acquisitions at 78 percent, access services at 60 percent, cataloging and metadata at 43 percent, subject or liaison librarians at 40 percent, technical services at 36 percent, instruction and reference at 34 percent, and scholarly communications and open education at 28 percent.

During interviews, several participants noted the importance of overseeing textbook affordability initiatives holistically and systematically. As seen in table 11, this work can be immensely collaborative, the domain of one or two people, or somewhere in between. At some institutions, this is clearly a passion project built for one. At other institutions, the advocacy of one librarian spread to larger groups, and even formal committees in a shared governance structure. There are advantages and disadvantages to either approach. One participant shared that it is easier and more efficient to manage when work is not distributed. Another indicated that attempts to recruit more broadly have not necessarily been successful: “People are at capacity in every library. [If you say,] ‘Hey, we’re launching this huge new thing that’s a multi-step, ongoing project for the rest of time. Everyone was like. No, thank you.’” Others shared that their textbook affordability teams are among their library’s largest and most collaborative. Although much of the labor in these programs is typically the purview of technical services staff, participants reiterated the importance of front-facing personnel: “We had someone from the library communications department on the Open Education Group for a few years, and she helped a lot with promoting our textbook purchases.”

Participants highlighted several examples of how these initiatives have broadened library collaboration by creating cross-institutional partnerships. In addition to partnering with bookstores, registrars, and individual academic departments to obtain textbook data, librarians have leveraged institutional partnerships to strategize purchases, assess their initiatives, and improve their workflows. Interviewees described receiving more detailed course data from registrar's offices, support and funding from student government associations and provost's offices, collaborating with advancement offices to receive endowment and gift funding, and partnering with institutional research offices to send textbook availability emails to students. Less common institutional partners mentioned by participants included campus housing, offices of distance education, online learning, student services, faculty development, academic technology centers, and deans and directors.

One participant noted that collaboration extends even beyond the institution. They have found community with librarians at other institutions and cited examples of sharing practices and code for a textbook database. Despite ad hoc communities of practice and workflows shared across libraries, the survey and interviews did not reveal any systemic or holistic approaches to affordability initiatives managed at the library consortia level. No-cost incentive programs are often managed at the consortia level and unlimited access e-book packages, perpetual e-book package purchases, and evidence-based acquisitions can be licensed and managed for consortia members—providing options for use in consortia member affordability initiatives—however, the authors did not uncover any consortia-level management of textbook affordability initiatives.

RQ2. What obstacles do librarians encounter in providing textbooks to students?

Lack of Time

Many institutions would like to do more but do not have adequate staffing for the laborious processes of identifying, purchasing, and making content available within a narrow window of time. Taking on new initiatives, especially ones as demanding as affordability initiatives, can be challenging for libraries emerging from post-pandemic staffing changes and new work realities. Several participants conveyed that their colleagues are working at capacity and as a result encountered challenges to integrating this work across library units and getting it prioritized. The perceived lack of time has inspired participants to seek out efficiencies at all steps along the way and had contributed to the iterative nature of workflows. Several participants mentioned process improvements made across multiple terms that have saved them or their colleague's time.

In rare instances, the opposite has been true; instead of struggling to operationalize these initiatives, librarians have successfully advocated for new positions to support them. One participant at a Carnegie R1 institution whose bookstore does not share data indicated that as the initiative expanded, it became a huge time commitment with six people compiling the list. Thanks to administrative support, they hired a term position specifically dedicated to this program. Another participant in a position dedicated to OER and affordable materials indicated that not only is their position new, their home department, which supports open initiatives, is also new.

The locus of the workflow intersected with the timing and a perceived lack of time, especially for program leads working outside of acquisitions or technical services units. A scholarly communication librarian shared that it had been a challenge to get their initiative

prioritized within collections and acquisitions workflows. When they proposed a timeline, their acquisitions department asked for a month longer (“Well, you’ll have to line up with everybody else.”) Delays in the process, of course, have a cascading effect that can result in faculty and students becoming aware of materials after courses have started and students have already purchased their textbooks. For librarians leading this work from outside technical services, sustained administrative support may be required to get the work prioritized.

Lack of Funding

As suggested by both survey and interview results, funding textbook affordability initiatives is not a straightforward proposition. Although many participants are able to “rob Peter to pay Paul,” a common concern was the lack of sufficient, designated, and permanent funding for textbook affordability initiatives. As indicated by survey results, a majority of respondents draw on existing collection budgets; interview participants indicated that working within the limitations of their collection budgets meant that there was less room for monographic collection curation, especially the collection of materials with no documented need.

Interview participants shared some innovative approaches to funding their initiatives. One participant from a doctoral university combines funding from collections, gift funds (endowments) and sales from Better World Books (BWB) for their initiative. They partner with University Housing to set up donation bins for students to give textbooks away rather than sell them back. This creates multi-copy inventory for the library and generates sales income from BWB. Another participant whose library functions as the campus bookstore indicated that all of the funding they use for their initiative comes from student textbook purchases from third party vendors. The library gets a percentage of the sales and accordingly their budget for the initiative fluctuates considerably.

Fitting New Strategies into Existing Services

Some participants are pairing textbook affordability initiatives with traditional course reserves services or retrofitting existing course reserves services to support textbook affordability more robustly. The use of CDL is not yet widespread in textbook affordability initiatives, but it provides one example of how librarians are incorporating new technologies and strategies into existing services. Library platforms including Alma have CDL management built in, and it seems likely that as CDL grows in familiarity librarians will increasingly incorporate it into textbook affordability workflows, especially when digital versions of a textbook are not available for institutional licensing.

Due to historical policies and practices, collection development librarians, liaison librarians with collection budgets, and other library personnel may not accept textbooks as an appropriate use of library collections budgets. Several participants noted that such policies and practices persist in their environments; the ease with which participants circumvent them says a great deal about the utility and enforceability of collection development policies. Assumptions around student preferences have also been an obstacle to textbook affordability initiatives. Although students may prefer print and buy print themselves, that does not mean that an e-book supplied by the library is irrelevant to them. One participant, for example, reported hearing from students that the e-books served as a companion to the print and could play a vital role in providing access when students could not use a print copy.

Vendor and Publisher Issues

Interview participants identified the lack of unlimited user licenses and DRM-free options as a major limitation of their textbook affordability work. Licensing titles individually and not as part of a bundle or collection was another common concern, as was licensing

courseware content and materials available exclusively via access codes. Unsurprisingly, participants find the pricing of licenses frustrating; it feels arbitrary at best and punitive at worst. Participants at some smaller institutions suggested that pricing should be more affordable and sustainable for individual e-books. One participant noted that the pricing of most electronic resources is based on enrollment figures, but that is not true of individual e-books. A university with an enrollment of 60,000 pays the same amount to license an e-book as a college with 600 students.

Another common refrain was “Why is it so hard to identify owned and subscribed e-books?” The e-book itself may be discoverable, though metadata quality can be questionable, but it is often unclear on the front end whether a title is owned or subscribed, has an unlimited or limited user license. One participant demanded: “Shouldn’t our systems do this for us?” Another participant bemoaned the utter lack of investment some publishers and vendors make in their platforms and metadata standards, both of which have implications for accessibility, discovery, and usability. A few participants mentioned usability issues, noting that it does not seem many publishers are attuned to user experience. Vendors could improve the usability of their platforms by ensuring they include page numbers in e-books and direct links to specific chapters or sections; this would make it much easier for faculty to assign readings. The initiatives often required students to navigate across various e-book platforms, all of which are not created equal. A few participants indicated that they defaulted to a particular e-book vendor after hearing from constituents that they strongly preferred it.

Publishers pulling, bundling, or restrictively dictating the terms of access for textbook materials was a common concern for librarians. These fears have been exacerbated by publishers’ recent offerings of bundled textbook packages. These bundles allow publishers to

make traditional textbook content available to libraries on their own terms and not through models that allow for selection, which is often preferred by librarians. Some participants referred to Wiley's removal of content during the fall 2022 semester. Librarians had to contend with this unplanned and large-scale removal; it made many question the wisdom of including subscription content in their textbook affordability initiatives. For some who had yet to start an initiative, the Wiley incident also shaped their current practices. For others, it made them question the publisher's intent: "I think that publishers are catching on to programs like this and making fewer textbooks available for purchase each semester. What might have been available as unlimited access is now not available. Are publishers pulling this content?"

Bookstore Issues

Beyond a refusal to share textbook data, bookstores and their business models can cause librarians a host of issues in building and maintaining a textbook affordability initiative. One participant shared that they wish there was more pressure from the top down to incentivize the bookstore to work with the library. A bookstore list would greatly improve their workflows and make their process more efficient. One participant indicated that a college administrator was more interested in maintaining a relationship with the commercial bookstore than supporting affordability initiatives: "she's more concerned about our for-profit contracts than she is about what's best for students."

The biggest threat to library-led textbook affordability initiatives may be bookstore inclusive access programs. Participants representing five doctoral conferring institutions indicated that faculty could opt in to inclusive access programs. The impact of these programs on their affordability initiatives included confusion and frustration: "I'm able to see how many courses are using inclusive access, and it's growing and growing every semester. And they're

getting these super high enrollment courses.” More than one participant indicated that they view such programs as an “existential threat” to the future of library support for textbook affordability.

RQ3. How do library-based textbook affordability initiatives align with library and institutional strategic initiatives?

As detailed in table 12, the popularization of this work and its spread throughout higher education is relatively recent. Almost half of respondents (48 percent) reported having participated in this work for three to five years and 74 percent of respondents reported having participated in the work for five years or less. Around a quarter of participants (26 percent) have been at the forefront of this work, supporting affordability programs for over six years. The start of this work coincided with pandemic lockdowns in at least 24 percent of respondents and multiple interviewees reinforced this alignment indicating that lockdowns played a role in starting, expanding, or accelerating their initiatives.

Table 12. How long have you been doing this work?

How long have you been doing this work?	Responses
Less than 1 year	7
1-2 years	17
3-5 years	47
6-10 years	18
More than 10 years	7
Grand Total	96

Doctoral Universities represent both the highest percentage of institutions leading these initiatives for more than six years (29 percent) and the highest percentage of institutions reporting

to be just getting started with two years or less of experience (31 percent). This may be due in part to support for innovation, specialization, and research at libraries serving doctoral universities. Relatively robust staffing levels at doctoral university libraries also support piloting new and labor-intensive projects. It is worth noting, however, that textbook affordability may be more closely aligned with the mission of libraries at baccalaureate and community colleges, where balancing teaching and research resources may be less of a consideration than at libraries serving doctoral universities.

Table 13. Longevity of initiative by institution type.

Baccalaureate College	12
Less than 1 year	2
3-5 years	7
6-10 years	2
More than 10 years	1
Community College/Associate's College	12
Less than 1 year	2
1-2 years	1
3-5 years	8
6-10 years	2
Doctoral University	45
Less than 1 year	3
1-2 years	11
3-5 years	18
6-10 years	12
More than 10 years	1
Health Professions	1
3-5 years	1
Master's College or University	24
Less than 1 year	1
1-2 years	4
3-5 years	13
6-10 years	2
More than 10 years	4
Multiple Institution Types	1
More than 10 years	1
Special Mission Public State College	1

Library Strategy

Interview participants indicated a wide range of perceptions on the degree to which their textbook affordability aligned with library and institutional strategies. For most participants alignment with library strategic initiatives was obvious and heartily supported by library administration. A recurring theme was that textbook affordability initiatives are one of the most direct and meaningful ways a library can support student success. By leveraging existing budget, resources, infrastructure and staffing, most academic libraries could offer some support for textbook affordability.

Participants who traced their program back to COVID-19 lockdowns had clear ties to library strategy. One participant whose program started in the wake of pandemic budget cuts said they “needed something happy to do” amid so much hardship and that same refrain was echoed by other interviewees that saw library affordability initiatives as meaningful and strategic work that had a direct and positive impact on students. One participant who serves as a library director indicated that it is “easy to communicate the value [of textbook affordability] to deans and administration.” They noted that academic librarians want to be involved in conversations around the creation of academic programs and courses but may not necessarily be included; affordability initiatives are an excellent way for the library to play a part in these programs.

No participants indicated that these programs do not align with their library’s strategic initiatives. The issue, noted by a few participants, was not strategic alignment but rather how to do the work given the obstacles outlined above. “The strategy is affordability, and they have different ways to operationalize that strategy.” Interview participants overwhelmingly shared sentiments along the lines of: “These programs can be the crown jewel in the library’s portfolio to present to provosts and presidents.”

Institutional Strategy

Although the alignment of library strategic initiatives and textbook affordability is consistently strong, respondents report more varied alignment at the institutional level. For many participants, institutional alignment and buy-in for textbook was literal. One interviewee at a Hispanic-serving institution with a large first-generation population and a large percentage of Pell Grant recipients shared that at their institution “affordability is in our blood.” They attributed the success of textbook affordability fundraising initiatives at their institution to strategic alignment at the institutional level.

Concerns about textbook affordability as an institutional strategy include intellectual freedom and contextual framing. Two participants said that academic administrators raised concerns about low/no-cost course designations and the perception that these designations limit academic freedom. A few participants at liberal arts colleges indicated that affordability has never been a strategic priority. One participant at a private college mentioned that their work is framed as an equitable access service rather than an affordability initiative: “Affordability did not have the same impact on private institutions and affordability as a discussion point would be misplaced.” Another participant asked, “if anyone [at their college] even cares about affordability?” One participant who serves as a director reiterated that textbook affordability could be a student recruitment point of pride and regrets the lack of administrative support.

Librarians seldom situated to define institutional strategy. Some participants in the study indicated that textbook affordability initiatives should play a larger role in institutional strategies. One participant at an institution with a long-standing and comprehensive approach to textbook affordability asked why more libraries are not positioned as they are to work comprehensively:

“Think about it, our faculty are often the sole creators of the content, and our students are the sole users [...] Why not institutionally support access to them?”

Open Educational Resources

Most participants noted support for OER through their libraries, universities, or consortia, whether funding or educational. A few participants noted that their library has prioritized open, and only funds truly open resources and not library-provided content in their OER grants. Despite appreciation for and support of OER, many participants also acknowledged a variety of reasons that OER cannot be the lone solution to textbook affordability. Although OER and textbook affordability happily coexist at many libraries, some participants shared examples of tension between OER and affordability. One participant at a community college shared that in years past a speaker advocated strongly for OER in a way that faculty felt was condescending, threatened their academic freedom, and stigmatized decisions to adopt traditional textbooks. The librarian has had to work hard to overcome this damage. Someone noted that if OER were incentivized on their campus, a future administration might penalize faculty for a lack of OER engagement.

One participant shared that the Open Education team at their institution oversees both textbook affordability and OER initiatives; they see them as complimentary. Another participant referred to course reserve and e-book purchasing programs as “middle ground” and “a path to affordability as open continues to develop.” Several participants similarly echoed that although open may be ideal, OER materials have yet to be developed for the specific needs of every course. Library licensed content can fill in the gaps and achieve the goal of providing zero-cost materials to students.

Conclusion

As the first multi-modal study of library-led textbook affordability initiatives in the United States, this study documents the considerations and divergences in their workflows, the obstacles librarians face in establishing and maintaining them, and their intersections with library and institutional strategy. The findings indicate that these programs have grown considerably over the past few years and are sustained—even despite permanent, designated funding—due to the positive connection they have with library and institutional goals.

There is considerable evidence that the cost of textbooks is a barrier to student success and reducing the cost of textbooks is the most direct, material support libraries can provide to promote the engagement and success of students. The addition of these well-used texts, which are commonly assigned multiple times, provides good value to librarians interested in responsible stewardship. Although participants acknowledged the opportunity cost of textbook affordability programs, both in terms of staffing and budgets, they indicated that their work is strategic and appreciated. Reasons that have been offered in support of abstaining from this work—library collection development policies, commitment to commercial bookstores, and valuing bibliographer’s expertise over students’ needs—seem outdated in the current environment of aligning library services with institutional priorities of student success and equity.

The study revealed the extent to which textbook affordability programs have grown out of their local environments; no two programs were alike. The diversity of program workflows, budget, focus, and scope demonstrates that these programs can scale from a small portion of assigned materials to comprehensive, from a one-time financial commitment of a few hundred

dollars to an annual expenditure in the tens of thousands. Such scalability allows for piloting affordability projects to establish and demonstrate their value to local administration.

Similarly, participants reported a variety of obstacles encountered and took different approaches to overcoming them based on local resources and needs. Funding concerns were articulated by almost all interview participants, but they nonetheless found money to continue this work. Although collection budgets were most often tapped, librarians have demonstrated great creativity and resourcefulness in funding their initiatives. The variety of funding sources— institutional and external grants, endowments, institutional fundraising, Better World Book sales, royalties from third party vendors, book donations, and one-time funds—highlights the versatility of these programs, their attractiveness to donors, and their eligibility for different funding models.

In addition to documenting the current landscape of textbook affordability initiatives in academic libraries, this study can also serve as a springboard to consider future trends and identify opportunities for ongoing research in this area. At most institutions, the campus bookstore is the primary source for required material data; if unwilling to collaborate, librarians must develop alternative workflows. Since most institutions rely on this partnership or seek to establish it, librarians need to develop strategies that provide mutual benefits and create a more symbiotic relationship with the bookstore. As made evident by some longtime practitioners of these programs⁵⁰, this could involve outreach and advocacy, with the library playing a key role in encouraging and facilitating more timely and complete faculty submissions to the bookstore.

As publishers and vendors make more textbooks available to the academic library market, whether as packages or individual titles, librarians may face challenging decisions about how far they are willing to go to support these initiatives. Many libraries currently support these

initiatives using existing collections budgets rather than new funding allocations. Although this approach works for now, an increase in available textbook content might lead to competition within limited library collection budgets. If libraries decide to invest more into these initiatives, then a greater percentage of library funds would be going to supporting commercial textbook publishers, which might be problematic for advocates of Open Education who seek to minimize the influence and reach of commercial publishers. This situation has a parallel to the issues some librarians are facing with transformative agreements; some advocates see read and publish agreements as circumventing or sidelining truly transformative and sustainable open access that alters scholarly publishing rather than shifts the burden of cost to libraries. An expansion of the library's role in provisioning textbooks could be similarly fraught.

In terms of future research, the return on investment of these initiatives needs to be thoroughly investigated. Although the usage of these materials has been researched and shown them to be a good value, librarians still have little knowledge of what percentage of students rely on library-provided materials as alternatives to purchasing their own. Are students using library supplied e-books as their primary mechanism (the library e-book is their sole access), a supplementary mechanism (they use the library e-book in addition to having purchased a copy), or not at all? We know that the usage of these e-books assigned in courses is often higher than other library-supplied e-books, but we do not yet understand the acceptance of library e-books as textbook replacements. Libraries are pleased to provide students with an affordable and equitable access option, but the extent to which students are availing themselves of these options is unknown. Future quantitative research--using data from authentication logs, LTI reading list tools, or other sources that provide patron-specific usage--and qualitative research, surveying students and faculty in courses for which library e-books were provided, would provide a more

accurate picture of the extent to which a library-provided e-book can function as a textbook replacement.

As demonstrated by the survey and interview data, textbook affordability initiatives are in various stages of starting, iterating to seek new efficiencies, and pursuing new partnerships to grow and advance them. It is the hope of the authors that librarians unconvinced by textbook affordability initiatives consider the value and alignment of these initiatives to institutional strategic priorities; these initiatives are scalable and customizable, they can be adapted to meet institutional needs and overcome institutional obstacles.

Appendix 1. Survey Instrument

- How long has your library supported an e-book textbook affordability initiative?
- At what type of institution are you employed?
- What is your library's total materials budget allocation?
- How do you get access to assigned materials data (lists)? Select all that apply:
- How many hours of library personnel time is spent collecting and compiling the data?
- In a single semester, how often do you get a list of assigned materials?
- On average, how far in advance of the semester do you get the data?
- Once you have the data, do you verify ISBNs, editions, and/or titles with instructors?
 - o If you need to verify the data, how many library personnel hours go into this process?
- Do you subscribe or license any unlimited access e-book packages (not EBA or DDA)?
 - o If yes, which packages? Choose all that apply:
- If you search the required materials list against already licensed content, how do you do that? Choose all that apply.
- If you match required materials to already licensed unlimited access e-books, how many library personnel hours go into this process?
- Do you buy new e-books for your textbook affordability initiatives?
- What parameters do you consider when deciding which course-assigned materials to license? Choose all that apply.
- What vendors or publishers do you buy from for your affordability initiative? Choose all that apply.
- Do you have a preferred vendor or publisher for the e-books that you purchase? If so, select your preferred vendor or publisher? Please choose one: - Selected Choice
- Why is this e-book vendor or publisher your preferred vendor? Please explain:
- Which user models do you use to support your e-book textbook affordability initiative? Select all that apply: -
- Do you buy DRM-free e-books when available? - Selected Choice
- What is your preferred user model to support your e-book textbook affordability initiative? Please explain why.
- What is the most you have spent on an individual e-book for your affordability initiative?
- On average, how much do you typically spend on e-books for your textbook affordability initiatives per semester?
- How is your e-book affordability initiative funded? Select all that apply.
- On average, how many hours of library personnel time are spent on purchasing and activating e-books for your affordability initiative?
- How are faculty and students notified that the library has an e-book available for their course? Select all that apply.
- On average, how many hours of library personnel time are spent contacting instructors and students, embedding in the learning management system, or using other strategies to make e-books available per semester?
- Personnel from which library departments contribute to this initiative? Select all that apply: - Selected Choice
- How much library personnel time is dedicated to this from start to finish (from getting the data to making the book available)?

- What are the biggest pain points in this process? Please explain.
- At what institution do you work? (This is asked to avoid duplicate responses from a single institution.)

Appendix 2. Interview Instrument

Your Library Workflow

- What is your position in the library and how does it relate to textbook affordability?
- Please walk us through your workflow from the identification of assigned materials to their promotion.
- The survey data indicated that the beginning (collecting and compiling the required material data) and end (embedding e-books or notifying users) are the steps of the workflow that require the most staff time. Can you talk to us specifically about those pieces of your process, where the complications arise, and what you think could be done to make these two processes more efficient?
- Compared to other collaborative projects in your library, how does this one rate in terms of the number of departments and individuals involved?

Funding Your Initiative

- How is your initiative funded? What changes have been made to allow for and accommodate this funding?
- You indicated that your library spends \$__ per semester on your e-book textbook affordability initiative. Do you imagine that this spend is less, more, or about the same as initiatives at similar institutions? Is there anything about your program or purchasing for it that might make it more limited or expansive than those at other similar institutions?

Vendor Issues

- Does your library use subscriptions in its affordability initiative? Why or why not?
- More and more libraries are supporting textbook affordability initiatives and investing considerable financial and staffing resources to support them; what do you think library vendors or publishers could do to make these initiatives more efficient and impactful?

Library or Institutional Strategy

- When and why did your library become interested in textbook affordability initiatives?
- Did COVID-19 change how your library engages in textbook affordability initiatives?
- What obstacles have impeded your library's participation in textbook affordability initiatives?
- Tell us about any institutional incentives for affordability or OER (including but not limited to those in the library).

Conclusion

- Is there anything we didn't ask about your textbook affordability workflow that you'd like to share?

Appendix 3. Survey Distribution Venues

- American Library Association Connect
- Association of College & Research Libraries (ACRL) Connect
- ACRL CJCLS (Community and Junior College Libraries Section)

- ACRL University Libraries Section
- Core Members Community
- Technical Services Interest Group
- Open Education Network
- SerialsST (Serials in Libraries Discussion Forum)

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