Managing commercial e-learning resources and tools

Purpose

This paper has been prepared to inform discussions across the University and make recommendations about the management of selection, negotiation, acquisition, discovery and dissemination of commercial e-learning resources and tools. A previous discussion paper and recommendations were endorsed by the Learning and Teaching Committee 3/2013, for the management of e-learning resources only. This new discussion paper includes e-learning resources and tools (see definitions below).

Introduction

The convergence of publishers producing scholarly content (e-learning resources) with companies providing e-learning tools and assessment is becoming increasingly commonplace. It is important that Monash consider how to manage the selection, negotiation, acquisition, discovery and dissemination of commercial e-learning resources and tools to ensure that this newly converged and integrated learning environment is managed in the interests of a cost-effective, pedagogically sound experience for staff and students.

For the purposes of this paper the following definitions apply to key terms:

- **E-resources** are broadly defined as including scholarly content provided in e-books (including e-textbooks), e-journals, and databases (aggregated subject specific collections of e-books, e-journals, theses, grey literature etc). E-resources the platforms necessary for their provision, and, where relevant, tools, necessary for use of this content.
  - **E-learning resources** are the sub-set of e-resources focussed on scholarly learning and teaching content. These increasingly incorporate interactive activities, including videos, tutorials or modules, and training programs (such as Lynda.com). Note that the distinction between e-resources intended for research purposes and the specific sub-set of e-learning resources is not always clear.
- **E-learning platforms** are the technical infrastructure on which e-resources are delivered to the user.
  - **E-learning tools** are the sub-set of platforms that allow e-learning resources to be delivered and that allow interactivity with scholarly content, learning activities and assessment tools (such as Pearson's mylab). This term is differentiated from e-platforms in recognition of the need to have specific strategies in place to deal with increasingly complex e-learning environment.

    Software applications such as SPSS, Captivate, Adobe etc and enterprise applications (such as Equella and Moodle) are not currently considered part of the e-learning tools suite.

At present e-learning resources are managed mainly by the Library, with some management occurring at faculty or school level. The Library manages all of the platforms underpinning e-resources, including e-textbooks while e-learning tools are usually managed by eSolutions, and occasionally the Office of the Vice-Provost (Learning and Teaching) (OVPLT) or individual faculties or schools.

Pearson Education, Cengage Learning, McGraw-Hill Education, Macmillan and Wiley are just a few of the multinational companies converging traditional scholarly content with e-learning tools. Monash University, through the Library, eSolutions, OVPLT and/or individual faculties, has subscriptions to some of these companies' e-learning resources and tools, and is also incorporating some into fully online courses being developed under the Monash-Pearson Alliance. Over the next few years we will see a revolution in the way students access, and interact with, e-learning resources and tools. While print to digital is the most obvious paradigm shift for information and learning resources overall, this is bringing with it revolutionary ways to learn and teach, and is also leading to development of new and wide-ranging business models of major significance for universities.

Key issues

1. Disruptive change
2. Pedagogical objectives
3. Financial implications
4. Selection, negotiation, acquisition, discovery, dissemination and management

1. Disruptive change

The e-revolution that has been rolling over, under and around the work of libraries and universities for the past ten years is now starting to focus on learning and teaching, and similarly dramatic changes can be expected to those experienced in research areas. It is not the purpose of this paper to detail all of the likely or possible changes, but to point out that the changes driven by the University or by others will have a profound effect on learning and teaching methods, use of physical facilities, technology, budgets and professional development. This paper focuses on just one aspect of this, how e-learning resources and tools can best be managed in the interests of the University.

2. Pedagogical objectives

The goal of the University in embracing the e-learning revolution is to enhance learning and teaching in a sustainable, efficient way. There is a danger that, without clearly defined pedagogical objectives, some e-learning activity that does not help achieve the University's learning objectives will be adopted. It would be beneficial for the University to articulate and adopt a set of principles that all parts of the University could use. The principles that the Library has adopted to inform its work are as follows.

- Students are at the centre of an active learning and teaching environment
- Students' ability to learn is underpinned by an incremental skills development framework
- Students require abilities and strategies to manage the overwhelming breadth and depth of information they are now exposed to
- Learning and teaching are research-inspired and aim towards excellence and employability

- Students gain maximum benefit from a team-based, collaborative approach between staff across the University and with other students
- Technology is used to enhance learning
- Continuous improvement is crucial for all learning activities and products created for and delivered to students.

3. Financial implications

E-learning resources and tools may cost more, may generate savings in some circumstances, and/or they may improve the learning experience. The University will have to determine the relative importance of each of these factors in deciding the merits of specific e-resources and tools.

In addition to this key issue, it is possible that the University will now have to start contributing to or paying the total cost of acquiring e-textbooks. For decades the purchase of textbooks has been the responsibility of students and, to a far lesser extent, the University Library in providing access to a limited number of textbooks for students. This is not a trivial matter. There does not appear to be any data on this, but if 60,000 Monash students currently acquire $500 worth of textbooks annually (this is simply a guess for the purposes of this discussion, and is likely to be conservative), and if that whole cost were to be transferred to the University because of the change in format to an e-textbook, that would be $30 million annually. Note that the Library's entire collection budget is currently $17 million. The Library provides a limited number of copies of prescribed texts, including e-textbooks (this is in part to provide the full range of resources for student learning and in part is a legal requirement that students not be compelled to acquire the tools necessary for their education[1]). The new e-learning environment does not work particularly well in this devolved model, as access needs to be supported centrally and the change in the nature of the e-textbook from a PDF to an interactive mode creates more complexity around the management of the content. Some publishers have only recently started to offer institutional access to the equivalent of textbook material (generally not including the interactive component), and there is now an urgent need to consider how Monash wants to manage these evolving relationships and the evolving nature of the e-textbook.

Related to this issue is the place of set texts into the future. Overseas, particularly in the UK, there is a general move away from set texts in all disciplines towards more independent, modular learning.

4. Selection access and management of e-learning resources and tools

This section focuses on how e-learning resources and tools are, or could be, acquired. It includes a degree of detail so that the paper can be used as a working tool in determining how best to proceed.

Current practice

The Library acquires e-resources and some e-learning resources for the teaching and research needs of staff and students of the University and currently spends over $11 million annually on e-resources. This includes subscriptions to over 1,000 databases (including a small but growing proportion of video tutorials, online training modules and interactive content), 160,000 e-journals and over 600,000 e-books. The Library currently selects, evaluates, negotiates and acquires scholarly content in partnership with academics. The Library also manages scholarly content (including licence negotiations

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[1] Note that Deakin University is currently challenging this prevalent interpretation of the Act. Refer Attachment

and access) and provides expertise and develops skills in the discovery and use of this content by staff and students.

In fulfilling these tasks the Library currently:

- Ensures equitable discovery and access (through systems such as 'Search').
- Negotiates the best price for the University (including Malaysia and South Africa where appropriate), often as part of the Council of Australian University Librarians (CAUL) negotiations.
- Builds relationships and works with faculties to assess and select the most appropriate resources based on the principles outlined below.
- Builds relationships and partnerships with vendors to ensure maximum value and a single point of contact.
- Manages complex licence agreements (in conjunction with the Solicitor's office).
- Understands the need to integrate with existing systems and works with eSolutions and OPVLT to do so.
- Endeavours to ensure that access to resources complies with licence agreements.
- Manages the evaluation and trial of products to ensure best fit for purpose.
- Negotiates the broadest possible usage from anywhere, at any time.
- Builds expertise in the use and integration of the products and content into curricula.
- Provides expertise and assistance on use of the resource or tool for the student and the academic.
- Ensures the products meet the needs of the users.
- Ensures duplication of content is kept to a minimum.

Issues associated with e-learning resources and tools

E-learning resources and tools in the broadest sense have a number of associated issues that need to be taken into consideration during acquisition and deployment:

- Varying business and pricing models.
- Avoidance of duplication of services and content
- Management of vendors and the need to ensure a single point of contact for the university.
- Contract negotiations with small and large vendors.
- Multiple operating platforms and varying levels of sophistication of these platforms and accessibility of content.
- Varying access (or restricted access) models making management of access complex: single use vs. multiple use; specific cohorts of users; IP access only; access via specific computers; campus vs. off campus access.
- Financial management, including the payment and management of renewals.
- Compliance with licence agreements and government guidelines.
- Integration with University systems and in particularly the management and monitoring of access.
- Customisation and personalisation of the e-learning resource or tool that means there is no consistent format or use.

Principles for selection and acquisition of e-learning resources and tools

The Library has developed the following principles to guide the decision making processes related to the selection and acquisition of e-resources that have been reviewed to cover e-learning resources and tools. These could be applied or adapted to the selection and acquisition of e-learning resources and tools that combine content with other components such as interactive platforms:

- E-learning resources and tools must support and contribute to the teaching and research programs of the University.
- Content should, wherever possible, be relevant to more than just a few users.
- Overlap with existing subscriptions and content should be kept to a minimum. Where there is substantial overlap with other e-resources, e-learning resources and tools, the commencement or continuation of subscriptions for overlapping e-resources and e-learning tools needs to be justified.
- There should be minimal requirement for special set up or software installation on specific computers.
- E-learning resources and tools should be accessible and made widely available as possible, and through the Library as a minimum.
- E-learning resources and tools should be in an accessible format where possible.
- E-learning resources and tools should be web based products. Non-web based e-learning resources and tools should be avoided.
- The e-learning resources and tools should be able to be readily supported by subject librarians and learning skills advisers without the need for high levels of subject or technical knowledge.
- The e-learning resources and tools should be continuously updated (rather than one-off purchases of data), except for archival material.
- A preference is given to multi-campus, off and on campus access, including South Africa and Malaysia, using Authcate to manage access rather than being limited to particular campuses, specific groups of users, unique IDs or individual computers.
- Notwithstanding the above, the cost benefit of restricting access to a particular site needs to be considered. Highly specialised e-learning resources and tools with limited audiences may be required and otherwise satisfy the principles laid out here, but not justify the additional cost of wide access.
- The Library expects the vendor to supply designated standard usage statistics to establish the value of e-learning resources and tools under consideration for renewal.
- The Library may purchase e-learning resources and tools at its own initiative where their value is readily apparent to the selectors.
- Availability of funding must be taken into account when purchasing e-learning resources and tools, with particular consideration needed when purchasing ongoing subscriptions.

Additional selection and acquisition principles for highly specialised and restricted e-learning resources and tools:

- E-learning resources and tools that have a very restricted audience (e.g. one or two staff or research students) should be purchased by the Faculty/Department rather than the Library.
- E-learning resources and tools that require advanced subject or technical knowledge should be located within and supported by the faculty/department.

- E-learning resources and tools that are not accessible in the Library are normally to be purchased by the faculty/department. A small group consisting of the Faculty Team Leader, Subject Librarian, Digital Resources and Subscriptions Librarian, faculty representative, eSolutions and OVPLT where appropriate should make the decision regarding what falls into this category.
- In circumstances where potential users are limited to a small user group within a faculty/department, the Library may consider contributing to the cost in accordance with the stated priorities of the relevant faculty and the ability of the Library to contribute funds.
- Requests by research students for e-learning resources and tools should be referred to their department and supervisor for consideration prior to Library's involvement.
- Requests for Library staff to investigate the possible purchase of such specialised e-learning resources and tools and organise demonstrations or trials should come from a designated co-ordinator in the faculty/department, eSolutions or OVPLT.
- The Library may request the faculty/department to organise the demonstration of specialised e-learning resources and tools that they have proposed for purchase by the Library.
- In the case of specialised e-learning resources and tools requested by a particular faculty/department for use specifically in their office and where ongoing IT support is necessary, the faculty/department will be responsible in consultation with eSolutions for technical support and initial and ongoing installation of updates.
- E-learning resources and tools purchased on a shared basis should be contracted for 12 months at a time or an agreement for continued funding for the duration of extended contracts should be made with the faculty/department.
- After a decision for a joint purchase between the Library, OVPLT, eSolutions and faculty/department has been made, the Library will be involved in the negotiations to purchase (contract and price) with the vendor.
- To help inform the Library's decision making process, faculties/departments are requested to assign priorities to their learning and teaching activities.
- Where there are conflicting priorities, greater weight will be given to more cost effective subscriptions or purchases.
- At the end of the contract period a review process will take place between the Library, OVPLT, eSolutions and faculty/department to determine whether the subscription should be continued and the arrangement for continuation if the subscription is to be continued.

The above principles can be applied to e-learning resources and tools that are predominately scholarly content or those resources that contain teaching and learning content, or both. Currently the Library has a number of e-learning resources (e.g. EASE, Atomic, Lynda.com). There are also some specific resources managed by individual faculties (e.g. Datastream - specific financial data). The above principles were applied to the selection and acquisition of both sets of resources. Specific e-learning tools managed by OVPLT (mylabs) are being reviewed and the principles could be applied in determining whether the subscription is renewed.

Additional issues to be taken into consideration in the selection, acquisition and deployment of e-learning resources and tools include:

- How to achieve coordination across the various parts of the University with an interest in or involvement with the selection, evaluation and acquisition of e-learning resources and tools, including the Library, OVPLT and eSolutions.
- Where and how the funding will be provided and whether taking a case by case approach is preferred for this type of resource, in particular as business models continue to evolve.
- How to manage different levels of experience across the University in dealing with the range of access models that will likely exist for some time as the e-learning resources and tools landscape develops.
- How to develop the appropriate skills and expertise required to use the tools, within the Library, OVPLT and eSolutions, and by academics and students.
- How to incorporate required expertise in the evaluation, trial and integration of the products into curricula.
- How to deal with the increased complexity involved in providing access and authentication in collaboration with eSolutions, particularly e-learning resources and tools that are customised and interactive in nature where no single copy remains the same.
- How to coordinate the increased number and sophistication of licence negotiations with vendors that do not yet have well developed business models for e-learning resources and tools.
- How to coordinate management of and compliance with licence agreements.
- Impact on the Library budget if expanded access to e-learning tools is sought.

Recommendations

1. That the Library manage and/or coordinate the selection, negotiation, acquisition, discovery, dissemination and management of e-learning resources and tools for the University, in collaboration with the OVPLT, eSolutions and faculties, using as a model the Library's current coordination of e-resources and e-learning resources decisions and processes.
2. That the pedagogical objectives above be adopted by the University as guiding principles for the selection and acquisition of e-learning resources and tools.
3. That the University recognise that an increase in the purchase of e-learning resources and tools will have a significant impact on the Library's collection budget.
4. That the current practice and principles be reviewed in 12 months to determine whether they are appropriate for e-learning resources and tools purchases.
5. That the implementation of recommendations above if endorsed, is staged, with stage one comprising the renewal/renegotiation of the Pearson mylabs product licence and decisions and processes for e-learning resources and tools sought for in-development Monash-Pearson Alliance courses.

Postscript

This paper and recommendations 1, 3, 4 and 5 above were endorsed by the Education Innovative Board at its meeting on 24 June. Recommendation 2 was referred to the Learning and Teaching Committee, to which a draft set of University wide pedagogical principles, building on those presented in this paper, will be taken by the Program Director, Better Learning and Teaching, Office of the Vice-Provost (Learning and Teaching), for feedback and endorsement.

Further reading

Briefing paper on eTextbooks and third party eLearning products and their implications for Australian university libraries. Prepared by Dr. Gillian Hallam on behalf of the Council of Australian University Librarians. Sept. 2012
http://www.caul.edu.au/content/upload/files/learning-teaching/eTextbook2012report.pdf
Note that, notwithstanding the title, this paper provides a useful overview of the emerging e-learning environment, and does not focus on their relevance to libraries.

Related documents

Access to and use of electronic resources licenced for the Library policy and procedures

ATTACHMENT 1: Case studies of other University management of eLearning resources and platforms

Deakin University

Deakin Library has had a range of discussions with publishers regarding their learning resources, platforms and pricing models, including Wiley, McGraw Hill, Cengage, VitalSource and CoInfo. The Library has emphasised to these publishers that an institutional pricing model is not a sustainable one for Deakin. A student pays model is the preferred model for the university as a faculty or library pays model will have financial sustainability issues.

The University Librarian is delegated as the key negotiator on e-learning resources for the University and the Library's role is one of education and advocacy rather than any form of policing. The Library has also established a new position of Scholarly Communication and Licensing Consultant – one of the responsibilities of this position is the provision of education and advice regarding third party publisher agreements for online learning resources and liaison with the University Solicitor regarding contractual arrangements.

Business efficacy requires that agreements between publishers and academics for online learning resources be assessed for risk, cost and reasonable terms and conditions. Whilst enterprise wide agreements are recommended it is recognised that there will still be individual agreements between academics and publishers. The Library's role is one of providing advice and education in terms of negotiating terms and conditions and the University Solicitor's role is advice on contracts and enterprise wide agreements.

The University does have some publisher plugins in place for integration to the LMS, but careful monitoring of integration requirements is required to avoid issues with privacy. Advice from the University Solicitor was obtained regarding some of the issues:

- Batch registration or uploading of data is not supported due to privacy issues – individual student registration is the recommended option.
- Students need to consent to disclose any personal information to third party providers. This is best addressed at a University wide level via institutional agreements and consent obtained at the time of enrolment.
- Assessments must be recorded on the Deakin LMS to be official – the use of assessments on publisher websites is not recommended due to privacy issues.
- Deakin University has an ethical responsibility for ensuring students are aware of any legal obligations in signing user agreements for publisher platforms.

The HESA 2003 Subdivision 19-D – the fairness requirements is unclear as to interpretation relating to online course materials. The *Administrative Information for higher education providers: student support (January 2012)* does however indicate that students cannot be charged for goods or services required for study unless a no cost alternative is also available. It is still unclear whether the provision of a number of free access codes is meeting these requirements. It is also unclear how many free access codes would be sufficient and how these would be allocated. Legal advice is currently being sought in relation to these issues. Deakin are seeking advice on these issues.

Queensland University of Technology by Martin Borchert,
CAUL paper 'Third party learning resources (TPLRS): an investigation

QUT provided a discussion paper to CAUL outlining an investigation they undertook on the management and implementation of e-learning resources and platforms.

QUT is aiming to provide a coordinated approach to the management and implementation of e-learning resources such as Mastering Pearson products; McGraw Hill and Harvard Business School products. The aim is for the management and implementation to be divided into a number of areas of responsibility.

Contract negotiation and pricing: The Library with the solicitor's office participates in the negotiation of contracts and pricing and provides a single point of contact for the University and the vendor. The Library pays for the product and seeks reimbursement from the faculties usually based on FTE. This has proven to be fraught, with the Library finding it increasingly difficult to ensure the product will be used and paid for by the faculty over the term of the contract. A significant lead time is required as the Library attempts to set up trials of the product and to get sign off from the faculty regarding the ongoing usage of the product. Generally the Library needs to confirm with the faculty usage before the start of each semester. Models also vary between vendors regarding purchase vs access to student copies and who pays. The Library is also responsible for ensuring a copy is available to meet HESA requirements.

The Information Technology Department is responsible for the integration of the product into the LMS and the batch loading of student information into the product. IT negotiates with the vendor to provide the integration with LMS.

Support in the use of the product for the academic and student is expected to come from the vendor.

Take up of products varies greatly between faculties, and also the product models vary. The Library is currently reviewing the management and implementation of e-learning products at QUT and reconsidering whether devolving the activity to the faculties may be better managed although resource intensive.

Swinburne University
Swinburne University negotiate on behalf of the student access to the appropriate e-learning resources and tools and the cost is included in the student fee. Further discussion with Swinburne regarding the management of the e-learning resources and tools is yet to occur.

Examples of e-textbook purchase models and comments from publishers regarding e-textbooks offered by the publishers

Monash University Library's preferred e-book standard is the perpetual access multiuser model where we purchase the title once in perpetuity and have unlimited simultaneous use online, on and off campus with access limited to Monash staff and students. Most of the Library's e-book titles are purchased this way or as multi-user non-linear. We try and avoid any single-user purchases as this is little better than buying a print version and the market has largely moved on from subscription models.

SAGE comments

Neither of these titles are currently available to buy via library aggregators or in electronic format to libraries directly. This is because they are bestselling textbooks and therefore SAGE earns revenue from student purchases, which we are concerned would be irreparably damaged if the e-book were available to all through the library.

Where budget is available to buy books for students, we offer the titles for institutional purchase: effectively the university is able to buy individual e-copies for individual students, using the VitalSource or Kortext e-book platforms at significantly discounted prices.

 Internal discussions did consider your request carefully and there was some interesting debate around this issue, but at present the licensing of these 2 major texts is not something

we feel able to explore further. We will instead continue to supply individual courses at Monash with all prescribed SAGE textbooks and to license our non-core texts to the library via our SAGE Knowledge platform or in conjunction with global aggregators

Other e-textbook models on offer include:
- Multiuser unlimited
- Multiuser non-linear, which allows up to 300 uses in a year, after which a 2nd copy will be purchased automatically. After 12 months the counter resets to zero.
- Textbook, which limits to 3 concurrent users and some 300 uses a year. Another option is that after 3 concurrent users is exceeded a 2nd copy can be purchased automatically. This repeats if 4 concurrent users use the book and so on. After 12 months from the purchase date of each copy the counter resets to zero.
- Single user, with unlimited, non-linear and textbook variations.
- Subscription model textbook where content is continuously updated

Pricing varies considerably according to the publisher both for general academic titles and textbooks.

Janette Burke, Director Resources   Cathrine Harboe-Ree, University Librarian
12 June 2014