

Queen's University Library
Course Readings Working Group Report
May 2009

Background

The Course Readings Working Group was formed to explore ways in which the Library could improve access to course readings at Queen's. This investigation was prompted by several developments.

First, there have been significant increases in the quantity of electronic information sources available for courses in recent years, and there have also been advances in license provisions and copyright decisions affecting the use of materials. In discussions last summer relating to a campus copyright information service, with individuals such as Professor Laura Murray and the managers of the AMS Publishing & Copying Centre, it became apparent that students and faculty may not be aware of the online options available to them for free, and also that Queen's could learn from the practices of other institutions such as the University of Calgary.

Second, the opportunities for online learning support are changing. Queen's is exploring new options for course tools and on a broader level there is growing interest in the concept of open courseware. An understanding of the issues and opportunities relating to course readings will help to inform decisions relating to new tools and the possibilities of exposing course reading lists more openly.

Third, budget reductions demand that the Library ensures the greatest efficiency and effectiveness possible in its course-related services. Since the Course Readings Working Group began its work, the Library has formed a Library Change Steering Group (LCSG) to guide the development of budget reduction strategies. The Course Readings Working Group recognizes that its conclusions and recommendations will need to be considered in the context of other matters being addressed by the LCSG.

The Course Readings Working Group reports through the Library's team structure to the Library Administration, but its findings are intended as well for the Centre for Teaching and Learning and ITServices, two of the Library's key partners in teaching and learning support. The membership of the working group includes Maggie Berg, a Professor in the Department of English and an Educational Development Faculty Associate with the Centre for Teaching and Learning, and Brad Murphy of ITServices. The mandate of the Course Readings Working Group is not to address all matters relating to course readings for other units across the university, but it needs to be informed by those broader perspectives.

The Group's terms of reference and membership are appended to this report.

Key stakeholder needs

The working group explored current practices and ‘points of pain’ in delivering and accessing course readings at Queen’s by speaking with and/or informally surveying several students, interested faculty, Library course reserves staff and other university stakeholders, including Diane Kelly (Queen’s Counsel), Rob Macnamara (Head Manager, Publishing & Copy Centre, AMS) and Chris Sinkinson (Web Manager, Campus Bookstore). Reports of these activities and meeting minutes are available on the working group’s wiki (<https://wiki.queensu.ca/display/QULCRWG/Course+Readings+Working+Group+--+Home>). The information gathered and the working group’s discussions can be synthesized into the following key points.

What is important to students?

Accessibility

Course readings must be accessible to all students, including those with disabilities. Currently, students registered with a disability can obtain course materials in an appropriate accessible format through Library Services for Students with Disabilities. It would be better if all course materials were made accessible automatically, without a student having to register with a disability. This is the intention of the proposed Accessible Information and Communications Standard, under the Accessibility for Ontarians with Disabilities Act (AODA) 2005. If passed, the Standard will require that all new course materials adhere to accessibility standards and be available in alternate formats. This requirement could be in place in 2010.

Course-centred approach

Students seem quite satisfied with how they learn about course readings now: through their course syllabi (print or online), WebCT or some form of online course page prepared by their professor. Sometimes readings are assigned in class and in tutorials.

Course details

The AMS has initiated a Syllabus Bank project to help students learn more about a course than is listed in academic calendars. The Senate Committee on Academic Procedures adopted a policy in April 2009, following feedback collected by Faculties and Schools at their Faculty Board and Council meetings, requiring that “before the end of the second week of the term in which a class starts, instructors of direct-entry undergraduate courses will provide a written outline of the basic features of the course to students and will provide an electronic copy of the outline to the AMS for future publication, with the exception of Commerce, which already has a publication process in place. The AMS will publish the outlines with a disclaimer stating that course descriptions are subject to change from year to year.” The AMS Academic Affairs Commissioner, Susannah Gouinlock, believes there are plans to restrict access to the Syllabus Bank by NetID, but this is not stated in the policy. The policy applies to instructors teaching direct-entry undergraduate courses in the following Faculties and

Schools: Applied Science, Arts and Science and Nursing. The policy was passed at Senate on May 20, 2009. (Queen's Meeting of the Senate Agenda, May 20, 2009, item III.3.c: http://www.queensu.ca/secretariat/senate/May20_09/May20_09.pdf)

Timeliness

Students want to know about course readings at the beginning of the course. This allows them to prepare in advance, manage their time effectively by seeing which weeks will have heavy reading loads and in some cases assess whether or not to take the course.

Cost

Students state that course packs are very convenient but very expensive. In early undergraduate years students tend to purchase course packs and textbooks as recommended, but upper year students will try to save money by searching for the readings in other sources (e.g. Google Scholar, library databases), borrowing from each other or purchasing second hand whenever possible. Students like it when journal articles are free to read online but not that it costs to print them.

Convenience

As noted above, students enjoy the convenience of course packs: it is simplest to obtain all course readings all at once at the beginning of term. Some observe that they'd rather not make the effort to use materials placed on reserve in the Library. Also it's frustrating that reserve material can't be renewed online, there are limited numbers of copies, one has to wait for material to be returned, the loan period is short once the material is in hand and the late fees are high. Online is convenient.

Format

Preference for format relates to convenience mentioned above. For online materials, students will print them for a variety of reasons, for example length, relevance to an exam or paper, desire to highlight or annotate. Some comment on eye strain, difficulty reading from a screen and slow response time as barriers to reading online. Some are concerned about environmental factors in printing. Anecdotally, Library staff observe that students would rather wait for a print book to be returned than read the electronic version.

Re-sale value

Some students keep all their textbooks and course packs for future use, but some need to sell them for financial reasons. Chris Sinkinson of the Campus Bookstore notes that publishers are promoting to faculty the ability to order textbooks customized for their course but the resale market for these items is much more limited than for standard textbooks.

What is important to faculty?

Understanding of and support for accessibility requirements

Faculty have collaborated with Library Services for Students with Disabilities staff to accommodate students with print disabilities with the provision of course textbooks, reserve readings, assignments, and course handouts in alternate formats (Braille, Large Print, e-text, etc.). Few faculty will be aware, however, that the proposed Accessible Information and Communication Standard requires that all course materials, including web sites, course management software, PowerPoint presentations, multimedia resources, etc. are accessible to persons with a disability. Information on web sites must also follow accessibility standards. The Adaptive Technology Centre staff have the skill, technology and experience to assist faculty with the provision of accessible course materials, but resources such as time and funding are limited. Within current resources, the Adaptive Technology Centre will not be able to meet the demands that may occur when the Accessible Information and Communication Standard comes into effect.

Course ownership/brand

Course web pages often have a narrative, personal style, including the reading list which is often annotated and makes sense as part of the course as a whole. Faculty sometimes exhibit a high level of creativity that goes well beyond the use of standard course management software. See, for example:

<http://post.queensu.ca/~straker/eng313/>

<http://www.sidneyevematrix.net/film240/index.html>

<http://dcownden.wordpress.com/>

Given the decentralized academic environment, faculty independence and the abundance of web tools commonly available today, the vision of a single course management system approach is waning. However, there are significant drawbacks to an ad hoc approach: individual faculty course web pages often don't conform to accessibility standards, and students lack a course portal that automatically provides all of their course information through a single sign-on. Some faculties, such as Applied Science, are addressing this through the development of their own portals. ITServices is continuing to pursue a replacement for WebCT to provide an option for all faculties, and as well is interested in exploring how a variety of widely available tools can be built into a cohesive learning environment.

The other aspect of 'ownership' important to many faculty is their intellectual property: some express a reluctance to make the course reading list publicly available, noting that they put a great deal of time into compiling it and it represents their own work.

Flexibility

Although many faculty rely on course packs, others see them as an inflexible and thus undesirable approach. They need to decide well in advance of the course what to include, so time constraints are an issue. No matter what the approach, faculty want to be able to add readings as the course progresses to be responsive to the needs of the

learners. They like that Library course reserve services allow them to add readings throughout the year.

Cost for students

The major reason for faculty not choosing course packs is the cost to students. Some faculty place a copy of the course pack on reserve in the Library in recognition that not all students can afford to buy one.

Convenience for students

Many faculty say that online readings are their preferred method of giving students access to required readings, largely because of the disadvantages of course packs and reserves at the Library. Overall, Library reserve readings seem to be the least popular choice; the reason most often cited is that it is not popular with students. Despite the relative popularity of online access, faculty also express reservations: that students do not bring the readings to class, and do not have the advantages of the physical document.

Format

Preference for online versus print seems to depend on the discipline; for example, the majority of faculty in English and Philosophy rely on books. Some problems are cited with regard to online: students complain about having to print the readings; copyright issues are complicated and not all articles are allowed to be online; accessibility is a problem; faculty don't have time or don't want to learn how to use WebCT or create a web page. On individual faculty web pages it is not uncommon to find links to scanned copies of print materials and also online purchase options. For example, see <http://research.cs.queensu.ca/home/cisc325/winter2009/readingsAndSoftware.html>. This example reminds us that our working group is misnamed: course 'readings' should really be course 'materials', which could include software and multimedia.

Quality

Obviously faculty select course materials for their intellectual content, but they also consider other elements of quality. In selecting online course readings, faculty are interested in added value beyond simply scanned text (e.g. ability to annotate, cut and paste) and ease of use (e.g. amount that can be printed).

Help

Although some faculty are adept at delivering course content on the web, others still rely on a print syllabus and have no idea how to provide readings online. Discussions in the Department of English indicate that many faculty there would be delighted to turn the mechanics of this over to the Library.

What is important to the Library

Accessibility

The Library has a strong commitment to accessibility standards. The Adaptive Technology Centre, located in the Library, offers a wide range of services and technology that enable students with disabilities to access Library and course materials. The Library's website design follows accessibility guidelines and we partner with Health, Counselling and Disability Services in the funding of Library Services for Students with Disabilities. We have in-house expertise and assistive technologies that can be used to create accessible learning environments and would like to provide advice and information to faculty about how to adhere to accessibility standards. However, we are not funded to take on the role of supporting all faculty in their creation of accessible online course readings.

Curriculum integration

The Library has long placed a strong emphasis on working directly with faculty to tailor its services and resources to academic programs and integrate them at the point of need. This integration with the curriculum will continue to be a priority as the Library restructures to deal with budget reductions.

Promotion of available information resources

In reviewing a number of course web pages and consulting with faculty, it seems there is often a lack of awareness of resources selected by the Library to meet the needs of academic programs at Queen's. This is an ongoing concern.

Maximizing e-resources

Faculty and students may opt for the convenience of a course pack, but ideally faculty would also provide persistent links to readings available online from a reading list on a course web page. (Review of a sample History course pack revealed that every article included is available through a Library database.) The Library can help to facilitate this access by providing instructions for creating persistent links.

Copyright-related advice

Faculty often consult Library staff about what is permissible with regard to sources already available online (downloading PDFs, linking to e-resources) and the digitization of print sources. We need to provide consistent answers in line with advice from Queen's Counsel.

Access to course information

Librarians need to have easy access to information about course assignments and readings in order to alert faculty to information resource implications and help students with research assignments. Although creating course spaces with restricted access makes sense in so many ways, it is problematic for the Library unless access is granted to the librarians directly involved with the curriculum.

Effective and efficient use of limited staff resources

There will be a significant loss of staff positions with the budget reductions required over the next several years, but the Library places a high priority on integrating services and resources as tightly as possible with the curriculum. We want to assess carefully the best use of staff resources, based on faculty and student need.

Effective course reserve policies

The Library needs to meet the information resource needs of a broad range of users within limited collections budgets. Placing an item on reserve helps undergrads in a specific course but limits access for the general user population of undergrads, grad students, faculty and staff who may also want to use it.

Online delivery options

Academic libraries have long used the term “e-reserves” to refer to the practice of making course readings available online instead of placing them on reserve in the library. For many libraries, it refers to obtaining copyright clearance to digitize print materials, as well as linking to existing digital content, and managing and providing access to those materials through a system such as Docutek Information System’s ERes online document management system or Atlas Systems Inc’s Ares system. (The Tri-Universities Group – Guelph, Laurier and Waterloo – uses the latter.) For the most part, these practices began before faculty commonly used course management systems or created their own course web pages, and when less content was available electronically.

Faculty at Queen’s employ a variety of methods for providing course information online. Some use WebCT. Some use locally developed course management systems, such as the School of Medicine’s ‘MedTech Central.’ Some develop their online course pages using a variety of available web tools. In the Faculty of Law, some faculty use TWEN, a course system offered by the publisher WestlaweCarswell. As well, the Faculty of Law is making use of QShare to provide webspace for course documents; access is limited to students in the course. The Queen’s wiki is also being used for some courses. For both QShare and the wiki, access can be limited by LDAP, which handles NetIDs and course groups.

Some libraries (e.g. Ryerson, Nipissing) are promoting the use of the RefShare feature of RefWorks, and the linking capabilities of SFX, to build course reading lists. The benefit of using SFX, an open URL resolver, is that there is less danger of broken links because the linking is done dynamically, but the drawback is that it doesn’t always take the user directly to the source. Queen’s Library Systems group is working with members of the Course Readings Working Group on reviewing best practices and compiling advice for establishing links at the article level. Another common method that libraries use to direct students to course readings is some form of online course guide, using systems such as LibGuides or similar locally developed systems (see for example, UBC’s course guides: <http://toby.library.ubc.ca/ereserve/er-coursepage.cfm?id=2400>). As well, it is possible to simply link to existing electronic content from the Library’s course reserve module, though in practice this is rare at Queen’s.

In this environment, the only reason for considering an “e-reserves” system would be if we were managing copyright clearances, and even then it would be hard to justify. Some libraries, such as the University of Calgary, are now giving up their “e-reserves” systems because of the proliferation of other options for faculty to manage course content. It would be desirable, however, to encourage uptake of NetID-controlled course spaces (and ideally librarian access to those spaces), as explained under Copyright and License Considerations, below.

In moving to online versions of materials instead of print, reliability and usability need to be considered. Some degree of troubleshooting should be anticipated, as recently experienced by several Canadian libraries: all students at the university were locked out of access to e-books on MyiLibrary because of reading patterns that the system interpreted as misuse. There needs to be strong confidence that links are durable and that vendor platforms are rarely down.

Copyright and License Considerations

Professor Laura Murray has encouraged us to consider the University of Calgary’s approach to making course readings available online, an approach that is now being adopted by others (e.g. Windsor, Dalhousie). Basically, they link to existing digital content where possible and will scan print material when the amounts fall within fair dealing and access to the output will be restricted to students within a course. See: <http://library.ucalgary.ca/services/faculty/placing-reserve-readings/ereserves> .

The important elements of Calgary’s approach are:

- For print materials scanned, access must be restricted to students in the course, in order to fall under the fair dealing provision of use for private study. In other words, when faculty ask if they can scan a chapter of a book for use in a course we would advise against placing it on an open web page but could suggest putting it in WebCT, a QShare class group or any other form of NetID-course-authorized web space. As well, the wording “a small portion” in this statement on Calgary’s site is important: “Ordinarily requests to use one article from an issue of a journal; one chapter from a book; or no more than a small portion of a collective work such as an anthology will be recognized as a fair dealing.”
- If material is accessible online, Calgary favours linking to it over making a copy of it (e.g. downloading a PDF and placing it in Blackboard), for two reasons. First, they don’t want to have to check database licenses to see if making a copy for course reserve or course management systems is allowed. Second, the fair dealing provisions of the CCH case consider six factors, the fourth of which is whether there is a reasonable alternative to making a copy. They consider the ability to link a reasonable alternative.
- There is no question about the right to link to material, no matter which database/license we’re dealing with.
- E-reserves are considered supplemental readings for courses.

Queen's legal counsel, Diane Kelly, has stated that she is comfortable with adopting Calgary's approach and providing relevant information for faculty on Queen's web pages.

Another copyright-related matter to explore is better sharing of information about library database license provisions. Some licenses contain provisions for including materials in course packs for the use of 'authorized users' in a course, though not for commercial use. The Campus Bookstore and AMS Publishing & Copy Centre may wish to explore this for their course packs. Some Ontario universities (e.g. McMaster, Ottawa, York) have useful experience to draw on in this regard.

Course reserve practices

The Library has six service points offering a course reserve service: Bracken, Education, Engineering/Science, Jordan, Law, Stauffer. Staff in Bracken, Law and Stauffer say they have seen a reduction in the number of items placed on reserve in recent years. Education has seen an increase in photocopies of book chapters. Engineering/Science has had an overall increase due to acquiring course textbooks but the amount of photocopied material is decreasing.

Many faculty opt for providing their course readings through course packs at the Campus Bookstore or the AMS Publishing & Copy Centre (P&CC) rather than through Library course reserves. Some will put a copy of the course pack on reserve in the Library as well. Until last Fall, the P&CC also ran a reserve reading system, whereby students could print on demand individual items or all items for a course. Access Copyright considered this an infringement of their license, and P&CC had to begin treating all their reserve readings as course packs and add a copyright charge. We anticipated that the Library would see a greater demand for course reserve services as a result of this change, but that did not occur.

In terms of "e-reserves", there seems to be no systematic support for encouraging the use of online versions of course readings. Linking from the Voyager reserve module to electronic resources in Library databases is very rare. Faculty might be encouraged by some staff to provide links to online materials within their course web pages, but in conversations with course reserve staff across the system this wasn't mentioned as a common practice. Few staff know how to create persistent URLs, which can be complicated because of variations across vendor systems.

Library staff are often consulted by faculty about the permissibility of digitizing print materials for distribution within an online course. We believe most staff have been saying this is not permissible, and know this to be the case with the Continuing Teacher Education courses in the Faculty of Education. We are not aware of any of the Library service units systematically providing scanning services for faculty.

The realm of course readings is as much related to the work of liaison librarians now as it is to course reserve staff, though not in the processing-related sense. Librarians work closely with academic units to raise awareness of resources acquired to support particular academic programs and they may advise

faculty on reading lists and aspects of course development and delivery, particularly in relation to inquiry-based assignments.

In thinking about the further migration of course readings from print reserves to online, there is a tension. On the one hand, there is a desire to retain a library role in helping faculty deal with the logistics of making materials available, because it helps to build the connection with the curriculum and opens doors for further collaboration and promotion of available information resources. On the other hand, there is little desire to have library staff handle new clerical tasks (e.g. scanning, creating persistent URLs, posting to a course website) in a time of budget reductions.

Conclusion and Recommendations

The main points, overall, are:

- Faculty and students seem quite satisfied with the listing of course readings through whatever vehicle they have for other course details, whether that is a print syllabus, WebCT or some other web-based tool. Though the method of listing is not an issue, access to the actual content could often be improved.
- Online materials are accepted as convenient and preferable to library print reserves (exceptions may still occur in the case of some e-book platforms). Course packs are convenient but expensive. Course reading lists with links to online materials provide maximum flexibility for students.
- Faculty members who have created their own course web pages will be required to adhere to the Information and Communications Standard and may turn towards using an accessible course management system. The Accessibility for Ontarians with Disabilities Act necessitates that Ontario Universities must meet specific accessibility standards. The Information and Communications Standard requires universities provide publications in a variety of formats (online, digital, print) that are accessible to all persons with disabilities. Information on web sites must follow accessibility standards. The Standard requires that the University develops policies about providing accessible information and communication. There will be an increased demand for information about accessibility requirements and for services to create accessible digital content.
- The matter of providing more open and easily accessible information about course readings, outside the silo of course management systems and the scattered nature of individual course web pages, is challenging in a decentralized environment with varying faculty approaches to sharing information about their course materials. The AMS Syllabus Bank was not designed specifically with course reading lists in mind, but it may provide a useful step in this direction.

The working group recommends that:

1. The Library follow the approach to online course readings approved by Queen's Legal Counsel:

Supplemental readings for courses may be made available online provided that access is restricted to members of a class and its instructor(s). This would include using products such as WebCT and other courseware. For print material that needs to be scanned, discretion must be used in deciding what amount of a work can be copied as a [fair dealing](#). Ordinarily requests to use one article from an issue of a journal; one chapter from a book; or no more than a small portion of a collective work such as an anthology will be recognized as a fair dealing.

Access may be provided to any material that is already digital if it meets any of the following three criteria:

- *The library has a license to the material and a persistent link to it can be created*
- *The library has a license to the material and the license allows a copy to be made for course reserve and/or use in a course management system*
- *The material is available on the open Web and a link to it can be created*

2. The Library create a support site to advise faculty of the options available for creating accessible course materials, including information on how to create persistent URLs, the criteria for accessibility and referrals to related services.
3. Existing and future course tools should be used for the delivery of course readings and a separate "e-reserves" system should not be pursued, but a feature of future systems should be the ability for library staff to access and contribute at least some elements of course content.
4. As part of its budget reduction strategies, over the next year the Library should transition to a policy of not offering print reserve for an item when a usable online alternative exists. Suggested steps for course reserve staff handling print reserve requests will be provided this summer, and experiences will be monitored throughout the year. In the context of discussions of priorities for and approaches to curriculum integration, consideration will need to be given to whether staff time freed from print routines can be transferred to other services such as creating accessible online copies and persistent URLs, and the positive role that any course-related contact plays in the promotion of available information resources.

Queen's University Library
Course Readings Working Group

Terms of Reference

(December 2008)

The Course Readings Working Group will explore ways in which the Library could improve access to information resources relating to Queen's courses. There are several factors driving this exploration:

- As part of its ongoing development of user services and current budget reduction strategies, the Library wishes to examine options for improving the efficiency and effectiveness of online delivery of course-related services and be informed by the current and future needs of students and faculty.
- Developments at other university libraries point to new options to consider in the presentation of course-related services and resources.
- Queen's is exploring new directions for course tools, looking at multiple types of tools for particular purposes rather than, or in addition to, a course management system such as Blackboard or Desire 2 Learn.
- There is growing interest in the concept of open courseware following the example of MIT (<http://ocw.mit.edu>), suggesting that course readings lists should be pulled out from behind course management system logins and hard-to-find faculty web pages.
- Through the AMS Publishing & Copying Centre and the Campus Bookstore, it seems that students may be paying for course readings they could easily access online. This may be to provide students with the convenience of inexpensive print copies, but it may also be that faculty and students simply aren't aware of the online options.

The group will:

1. Explore Queen's current practices and 'points of pain' in delivering and accessing course readings, consulting, for example, with faculty, the AMS, the Bookstore, liaison librarians, course reserves staff and ITServices.
2. Explore the landscape of e-reserves systems, citation management systems and course management systems beyond Queen's, in terms of software, policies and practices relating to course readings.
3. Review the Library's current policies and practices relating to electronic course readings (for example, linking to articles in licensed databases and including the proxy prefix in the link, placement of course information on the library website)
4. Make recommendations for new policies and practices or next steps as appropriate.

Timeframe

January through April 2009, with the possibility of shortening or lengthening according to the recommendation of the group.

Liaison and Reporting

The group will liaise with appropriate teams, units and individuals in the Library, ITServices and the Centre for Teaching and report to the Library's Electronic Gateway Team.

Membership

Maggie Berg, Professor (English) and EDFA, Centre for Teaching and Learning

Wendy Huot, Library Systems

Brad Murphy, ITServices

Sharon Musgrave, Access Services, Stauffer Library

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Mary Claire Vandenburg, Learning & Research Services, Stauffer Library

Martha Whitehead, Library Administration (Chair)