



Policy paper presented by

Educational Materials Beyond Textbooks: Learning in the 21st Century

 **CASA | ACAE**
Canadian Alliance of Student Associations
Alliance canadienne des associations étudiantes

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Table of Contents

3	CASA Principles
4	CASA's Vision for Educational Materials
5	How Educational Materials Impact Education: The Connection Between Affordability and Quality
7	Overview of CASA's Policy Recommendations
9	Open Access to Scholarly Publications
10	Copyright and Fair Dealing
12	Removing Taxes on Educational Materials
13	Collecting Better Data
14	Summary of Suggested Changes

CASA's Principles

Principles

Educational Materials are an integral part of the academic experience and are necessary tools to train and educate the next generation. When considering the scope of educational materials, it can be easy to think about textbooks and textbooks only. For the purposes of this paper, educational materials encompass a wide array of books, articles, texts, audio-visual materials, course packs, and other teaching and learning tools that instructors and students draw on to advance their knowledge in a given field of study. In the 21st century classroom, educational materials can take entirely new forms. There is no post-secondary student in Canada in any program, whether at a college, university, or polytechnic, whose education is not impacted by decisions around educational material availability, cost, and format.

From the perspective of students, it is therefore imperative that educational materials be accessible, affordable, innovative, and of the highest quality.

Students cannot succeed if educational materials are not accessible and affordable. Accessibility of educational materials means a variety of things, including their physical or digital availability, the ability of all students including those with disabilities to use them and their presence in a variety of different formats. Affordability means that all students can access the materials they need to fully participate in and benefit from their studies, without experiencing undue financial hardship.

An innovative and high quality education is largely based on the ability of students to tap into the widest array of ideas, information, and knowledge possible. For post-secondary in Canada to be high quality and innovative, the educational materials students use must constantly evolve. This evolution must not be limited to the content of the materials themselves, but also occur in the platforms and tools that make content available.

CASA's Vision for Educational Materials

CASA envisions a post-secondary system where students have access to educational materials that are accessible and affordable. CASA firmly believes that no student in Canada should feel they cannot access or acquire required materials for their academic success. Furthermore, the classroom and the materials used in them continue to adapt with new technologies, and CASA envisions a high quality post-secondary education system where exposure to new and innovative materials for teaching and learning are available for all students to engage with.

In particular, CASA supports the following vision statements and goals:

- » **Students having access to the widest array of information, ideas, and knowledge possible is a core component of any high quality and innovative post-secondary education;**
- » **Educational materials must be of the highest quality, while also being readily available and affordable;**
- » **No student should be limited in their ability to pursue and succeed in post-secondary education due to the financial hardship of acquiring educational materials;**
- » **Students should be able to access the educational materials they require for their studies in accessible formats;**
- » **Open access publications and materials should be promoted and utilized wherever possible because they maximize access to information, affordability, and adaptability to the diverse needs of students**

How Educational Materials Impact Education: The Connection Between Affordability and Quality

It is clear in Canada that the cost of attending post-secondary education continues to rise with each passing year. While the cost of tuition and living expenses are given a lot of attention when determining the rising cost of education, no aspect of an education has increased at a greater rate than educational materials. While there is a general lack of Canadian data on the topic, a study from the U.S. Bureau of Labour Statistics has indicated that **college textbooks prices have increased by 1,041% since 1977**, vastly outpacing the general inflation rate which has increased 235% over the same period.

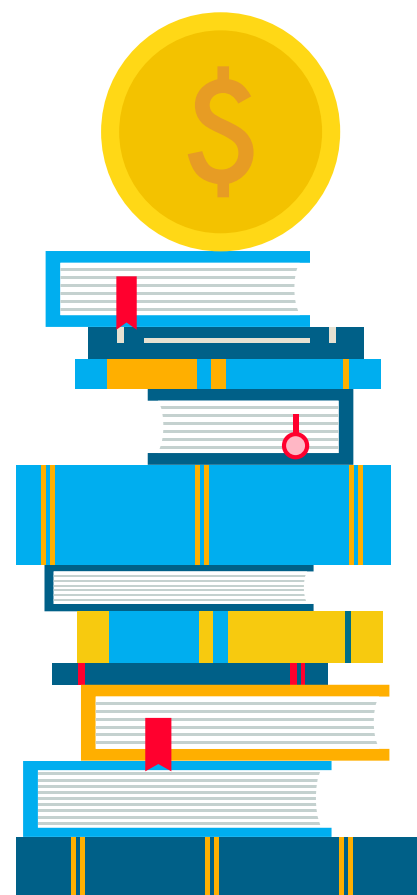
¹ This hyperinflation of book costs has led to Canadian students being told to expect to spend between \$800 and \$1,000 on their books upon arrival at school.

² Unfortunately, this has resulted in a situation where many students simply do not buy educational materials because of financial barriers. One B.C. study indicated that 54% of students reported not buying a textbook at least once due to cost.

Unfortunately, those who struggle to afford educational materials are those who already have other affordability and accessibility issues with post-secondary education.

Those who have reported not purchasing a textbook due to cost also report working more hours than those who did not and are more likely to have a student loan. ³

Additionally, 30% of students also report earning a lower grade in their courses due to high textbook costs. When the cost of educational materials has reached a level



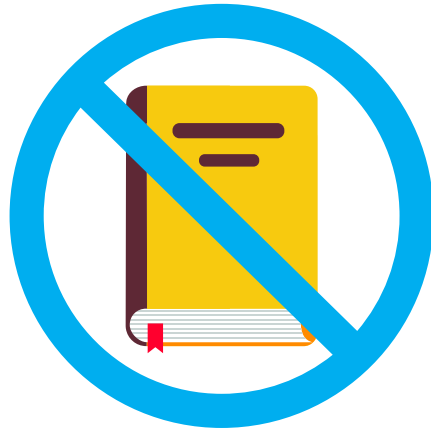
Students expect to spend \$800 to \$1000 on Textbooks each year.

where it disproportionately impacts those who are already struggling to afford school and it begins to impact their academic performance, it's time to take action.

¹ "College Text Book Prices Have Risen 1,041 Percent Since 1977. NBC News, 2015. Accessed online: <https://www.nbcnews.com/feature/freshman-year/college-textbook-prices-have-risen-812-percent-1978-n399926>

² "Budgeting for student life," *Financial Consumer Agency of Canada*. Accessed online: <https://www.canada.ca/en/financial-consumer-agency/services/budget-student-life.html>

³ Rajiv Jhangiani and Surita Jhangiani, "Investigating the Perceptions, Use, and Impact of Open Textbooks: A Survey of Post-Secondary Students in British Columbia," *International Review of Research in Open and Distributed Learning* 18, no. 4 (June 2017): 172-192. <http://www.irrodl.org/index.php/irrodl/article/view/3012/4214>



**54% of students
reported not buying
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Educational materials are a necessary part of any education and no student in Canada should feel they cannot purchase required educational materials due to a financial barrier. This is unjust and contrary to an accessible and affordable post-secondary education system in Canada. Students should have access to the widest array of ideas, information, and knowledge possible. CASA strongly believes that the federal government has a role to play in reducing barriers to post-secondary education. Taking action to make innovative new materials available to students is important for the continued development of a knowledge-based economy. In the following sections of this paper, CASA outlines its recommendations to the government to reduce barriers for students and optimize their success.

Overview of CASA's Policy Recommendations

Open Educational Resources

The advancement of technologies is changing the way students consume content and thus, learn. Open Educational Resources (OERs) are just one of the many new learning tools that are fundamentally changing the way students engage with learning materials, while simultaneously reducing costs and removing barriers to learning.

OERs are “teaching, learning, and research materials in any medium that reside in a public domain or have been released under an open license that permits their free use and re-purposing by others”.⁴ These are made available under a Creative Commons license which means the author has permitted their work to be accessed, reproduced, and modified for free. OERs can be textbooks, as well as other learning materials, like tests, lesson plans, lecture notes, videos, case studies, software, or other course tools. CASA views OERs as being an increasingly accessible and high-quality option to tackle rising costs of textbooks. An excellent example of the effectiveness of OERs comes from the province of British Columbia (BC). In 2012, a government investment of \$1 million was made into BC Campus for the development of OERs, and the project has been a large success. As of September 2018, student savings attributed to OER use in BC are between \$8.8 and \$9.2 million. 90,000 students in BC across 40 institutions now use OERs in their courses.⁵ The implementation has been so widespread that some institutions in BC now offer Zed Cred programs, which are certificates or associate degrees with zero

textbook costs due to the use of OERs and free library materials.⁶ British Columbia is not the only province to get on board with the funding of OERs either. The Government of Ontario recently funded a not-for-profit organization called eCampus Ontario to advance the use of OERs in the province.⁷



**Students in BC
have saved between
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thanks to OERs**

While the financial benefits of OERs are clear, there are a number of other benefits to consider as well. For example, one might question the quality of free resources when compared to expensive textbooks released by prominent

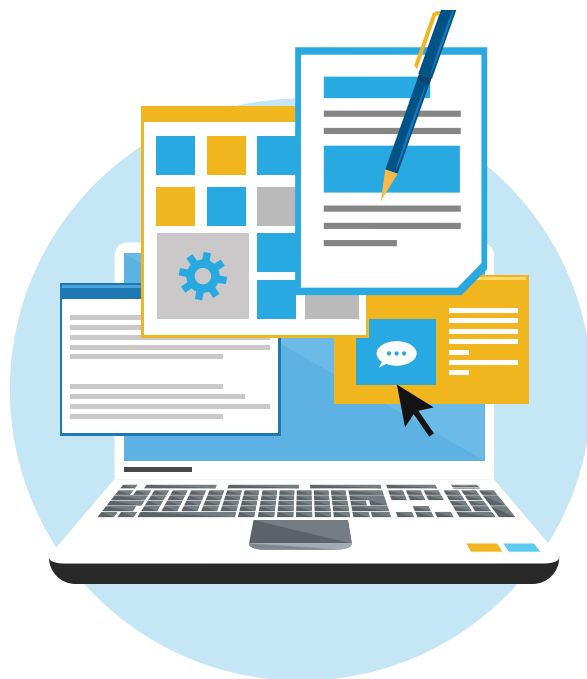
⁴ Education/OER (Creative Commons). Accessed online: <https://creativecommons.org/about/program-areas/education-oer/>

⁵ Open Education Fact Sheet 2018. BC Campus, 2018: Accessed online: <https://bccampus.ca/files/2018/10/OpenEd-Info-Sheet-Fall-2018.pdf>

⁶ Open Education Fact Sheet 2018. BC Campus, 2018: Accessed online: <https://bccampus.ca/files/2018/10/OpenEd-Info-Sheet-Fall-2018.pdf>

⁷ About eCampus Ontario. eCampus Ontario. Accessed online: <https://www.ecampusontario.ca/about/>

publishing companies. Fortunately with OERs, free does not mean inferior quality. **Students who use OERs report the quality of the resources as just as good, if not better, than traditional textbooks.** Specifically, 96% of students felt the quality of OERs was either average, above average, or excellent.⁸ Additionally, there are other accessibility benefits beyond cost. OERs can be modified to



suit diverse teaching and learning needs. Furthermore, these modified OERs can be shared freely so other instructors can use them creating more accessible classrooms. The BC Open Textbook project includes an “Accessibility Toolkit” which is intended to help instructors “create a truly open and accessible textbook.”⁹

With some provincial governments leading the advancement of Open Educational Resources, **the federal government can and should get involved in the development of resources that will ultimately make education more accessible and affordable.**

CASA envisions that the Canadian Granting Agencies (CGAs) would have a significant role to play here in the distribution of funds that would be used for the development of OERs by faculty members, researchers, or students. CASA has advocated to the federal government on this, and it was later endorsed as a budget recommendation by the Standing Committee on Finance. The advancement of OERs is a proven method to increase accessibility and affordability, while maintaining or potentially even improving the quality of post-secondary education in Canada.

Excerpt from Finance Committee Report:

“Recommendation 19: Support a pilot project through the Social Sciences and Humanities Research Council of Canada, the Natural Sciences and Engineering Research Council of Canada and the Canadian Institutes of Health Research that would provide students and faculty with an incentive to develop open educational resources”¹⁰

- » **CASA recommends that the Government of Canada work with the Canadian Granting Agencies to fund the development of Open Educational Resources.**
- » **CASA recommends that the Government of Canada support provincial and territorial governments to implement Open Educational Resources policies and regulations, with a target of reaching the 40 highest enrolment undergraduate, and 20 highest enrolment trades and skills courses, following the goals of the BC Open Textbook Project.**

⁸ Rajiv Jhangiani and Surita Jhangiani, “Investigating the Perceptions, Use, and Impact of Open Textbooks: A Survey of Post-Secondary Students in British Columbia,” *International Review of Research in Open and Distributed Learning* 18, no. 4 (June 2017): 172-192. <http://www.irrodl.org/index.php/irrodl/article/view/3012/4214>

⁹ BC Open Textbook Accessibility Toolkit (BCcampus Open Ed). <https://opentextbc.ca/accessibilitytoolkit/>

¹⁰ Driving Inclusive Growth: Spurring Productivity and Competitiveness in Canada: Report of the Standing Committee on Finance. House of Commons, 2017. Accessed online: <http://www.ourcommons.ca/Content/Committee/421/FINA/Reports/RP9312006/finarp21/finarp21-e.pdf>

Open Access to Scholarly Publications

Increasing student access to the widest array of information is vital to a high quality and innovative education. **Open Access is a movement that provides free and unconstrained access to academic research.** Open Access information makes conducting research more affordable for students, researchers, and faculty members. It also increases the return on investment for government, as their funded research can be completed more efficiently, and can have more far-reaching impacts as others access and/or build on it. In an effort to improve the accessibility of research in Canada, the federal government should ensure that all publicly funded research should be made available in an Open Access format.



Open Access is defined by the Budapest statement as “free availability on the public internet, permitting any users to read, download, copy, distribute, print, search, or link to the full texts of these articles, crawl them for indexing, pass them as data to software, or use them for any lawful purpose, without financial, legal, or technical barriers other than those inseparable from gaining access to the internet itself”.¹¹ The statement allows for one copyright restriction: to preserve the author’s “control over the integrity of their work and the right to be properly acknowledged and cited”.¹² CASA was pleased to see the Tri-Agency Open Access Policy on Publications created and applied to all 3 granting agencies in 2015.¹³ While this was promising and addressed many of the concerns CASA had on Open Access, there are still a few considerations that should be addressed. For example, while the publications are made available, they are not necessarily guaranteed to be made available in their post-refereed format. Ensuring that post-refereed formats are made available as a standard part of the Open Access policy would ensure the highest quality standard and academic rigour possible on publicly funded research. Open Access has come a long way in Canada in recent years and only minor revisions are required.

» **CASA recommends that all post-refereed manuscripts that are a result of publicly funded research be made available in an Open Access format.**

¹¹ Open Society Foundations. *Budapest Open Access Initiative*. 2002. Accessed Online: <http://www.soros.org/openaccess/read>

¹² Open Society Foundations. *Budapest Open Access Initiative*. 2002. Accessed Online: <http://www.soros.org/openaccess/read>

¹³ Tri-Agency Open Access Policy on Publications. Government of Canada, 2015. Accessed online: http://www.science.gc.ca/eic/site/063.nsf/eng/h_F6765465.html?OpenDocument

Copyright and Fair Dealing

A key aspect to achieving a post-secondary education system that is accessible, affordable, innovative, and of the highest quality, is upholding the right for students to access information. CASA strongly believes that educational fair dealing should be preserved. Since the previous copyright review in 2012 that instated educational fair dealing in the Copyright Act, fair dealing for educational purposes has proven instrumental in reducing barriers to education, fostering innovation, and enhancing the quality of the post-secondary experience.



Fair dealing is an exception to copyright infringement set out in the Copyright Act that permits the use of copyrighted work without permission or payment to the copyright owner under specific circumstances. When the Copyright Act was last amended in 2012, “education” was added to the list of fair dealing exceptions. Since the change was brought in, post-secondary institutions across the country began to implement policies permitting the copying and sharing of up to 10% of work, or a chapter from a book, for educational purposes under fair dealing.

This meant post-secondary students began to receive wider access to information and materials for use in their courses. These additional materials increase the variety of perspectives and ideas a student is exposed to, thus improving the quality of education without increasing costs. Students benefit from fair dealing because it allows them to access more information than they could before, as instructors are no longer limited to course materials that must be purchased. This has also allowed students and instructors to use music, video clips, and images to aid learning, which enhances student learning in the classroom. Before this change in Copyright law, instructors often hesitated to share additional works and materials out of fear that they would be infringing on copyright.

The expanded access to learning materials is not the only important benefit fair dealing has granted students. Another is that fair dealing has helped to bring down education costs. In 2013 at the University of British Columbia, following the change to copyright law, the average price of a course pack was reduced by 33%.¹⁴ Fair dealing did help reduce cost to the course pack, but it wasn't by any means “free” dealing. The UBC Copyright Office explains: “The price of course packs produced by the UBC Bookstore include the cost of production, and fees paid to obtain any necessary copyright permissions. Note that materials included in a course pack under the fair dealing exception or a UBC electronic resource license are included in course packs without additional copyright fees (only the production costs apply).”¹⁵ The University of Toronto also ran a pilot project in 2014-15 that focused on reducing the

¹⁴ “Course Pack prices significantly reduced in Fall 2013, Copyright at UBC” (Copyright at UBC). Accessed online: <http://copyright.ubc.ca/course-pack-prices-significantly-reduced/>

¹⁵ “Student FAQ, Copyright at UBC” (Copyright at UBC). Accessed online: <http://copyright.ubc.ca/guidelines-and-resources/faq/student-faq/>

cost of course packs by implementing fair dealing policies. The pilot project involved 12 courses and 877 students with total student savings reaching \$406,038 by Fall 2016.¹⁶ Both of these projects demonstrated that a combination of fair dealing combined with modern digital products (e.g. course portals and digital library reserves) make possible further “efficiencies and savings for students”.

Technological protection measures, such as digital locks, are also regulated by the Copyright Act. **CASA believes the way digital locks currently work is out of step with fair dealing provisions within copyright law.** Digital locks prevent students from legally accessing parts of academic resources under the fair dealing framework.

While digital locks are intended to ensure that creators receive appropriate compensation, in reality they dissuade students from accessing those materials and lead students to look for the content elsewhere.

- » **CASA recommends that the Government of Canada maintain education as a component of fair dealing being preserved in the Copyright Act.**
- » **CASA recommends that the technological protection measures in the Copyright Act be reformed to ensure that they do not contradict with the framework established by fair dealings for educational purposes.**

¹⁶ Nancy Cancilla, Bobby Glushko, Stephanie Orfano and Graeme Slaght, “Engaging Faculty and Reducing Costs by Leveraging Collections: A Pilot Project to Reduce Course Pack Use,” *Journal of Librarianship and Scholarly Communication* 4 (2017): 2.

Removing Taxes on Educational Materials

While new and innovative educational materials are being created and implemented at post-secondary institutions across Canada, traditional textbooks are still a big and important aspect of the educational materials market. Textbooks and educational materials are a part of the educational journey and an expense that is unavoidable for every student in the country. Unlike other aspects of a post-secondary education, textbooks have a sales tax levied on them, either the Goods and Services Tax (GST), or the federal portion of the Harmonized Sales Tax (HST). Applying sales taxes to such a large and necessary expense has a negative impact on the accessibility of post-secondary education and disproportionately impacts the most marginalized.

Removing taxes on textbooks is not a new idea in Canada; in fact, all the provincial governments do not charge sales taxes on textbooks. Until very recently, the federal government also had its own tax measures to assist with the affordability of textbooks called the Textbook Tax Credit.¹⁷ However, in the process of reallocating funds to up-front, needs-based grants in recent budgets, these tax credits were cut. While CASA supported the progressive decision to reallocate funds to those with the most financial need, support for textbook costs is still needed.

Textbooks cost a substantial amount of a student's limited income, and removing sales taxes on a product for educational purposes would ease some of the financial burden placed on students, while having a relatively small impact on government tax revenue.



» **CASA recommends that the Government of Canada exempt books used for educational purposes from the Goods and Services Tax, or the federal portion of the Harmonized Sales Tax (where applicable).**

Collecting Better Data

While students should have access to the widest array of information, ideas, and knowledge possible for a high quality education, the general prevalence of education-specific data in Canada is limited. This lack of information makes it hard for students, academics, and policy-makers to make informed decisions about post-secondary education. Furthermore, **there is almost a complete absence of Canadian-specific data on textbooks and other educational materials**. Educational materials are a key component of a high quality education system, and better data needs to be collected and published by the Government of Canada moving forward to inform key policy decisions.



» **CASA recommends that the Government of Canada track and publish Canadian specific data on educational materials**

Summary of Suggested Changes

- » CASA recommends that the Government of Canada work with the Canadian Granting Agencies to set aside funds in the development of Open Educational Resources.
- » CASA recommends that the Government of Canada support provincial and territorial governments to implement Open Educational Resources policies and regulations, with a target of reaching the 40 highest enrolment undergraduate, and 20 highest enrolment trades and skills courses, following the goals of the BC Open Textbook Project.
- » CASA recommends that SSHRC and NSERC make all associated datasets that are a result of publicly funded research available in an Open Access format.
- » CASA recommends that all post-refereed manuscripts that are a result of publicly funded research is made available in an Open Access format.
- » CASA recommends that the Government of Canada education as a component of fair dealing being preserved in the Copyright Act.
- » CASA recommends that the technological protection measures in the Copyright Act be reformed to ensure that they do not contradict with the framework established by fair dealings for education purposes.
- » CASA recommends that the Government of Canada exempt books used for educational purposes from the Goods and Services Tax, or the federal portion of the Harmonized Sales Tax (where applicable).
- » CASA recommends that the Government of Canada track and publish Canadian specific data on educational materials.

Our Members



About CASA

Established in 1995, the Canadian Alliance of Student Associations (CASA) is a non-partisan, not-for-profit, national student organization composed of 23 student associations representing 280,000 post-secondary students from coast to coast. Through its partnership with the Quebec Student Union (QSU) and their 8 members representing an additional 79,000 students, CASA presents a national student voice to the federal government. CASA advocates for a Canadian post-secondary education system that is accessible, affordable, innovative, and of the highest quality.



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