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APPLYING UDL GUIDELINES TO OER MARKETING AND OUTREACH

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Citation	Davis, S. (2024). Applying UDL guidelines to OER marketing and outreach. In D. Skaggs & R. M. McMullin (Eds.), <i>Universal Design for Learning in Academic Libraries: Theory into Practice</i> (pp. 195–206). Association of College & Research Libraries.
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Applying UDL Guidelines to OER Marketing and Outreach

Sabrina Davis

Introduction

Open educational resources (OER), open access (OA), and other areas focused on open values have clear connections with Universal Design for Learning (UDL). Much like UDL, open values are focused on student success, accessibility, and educational equity. While these connections between OER and UDL are valuable, this chapter provides a different approach to connecting OER with UDL. In this chapter, I discuss ways for academic librarians to apply the UDL guidelines, as outlined by the Center for Applied Special Technology (CAST), when marketing information about OER efforts to university stakeholders, including faculty, students, staff departments, and academic administration.

Each stakeholder group is likely to have different needs and agendas based on their varying positions and responsibilities, so it is important that librarians are marketing OER accordingly for each group in order to achieve maximum adoption at their institutions. Throughout the chapter, I examine two principles of UDL (engagement and representation) and provide examples of how to apply some of the guidelines and checkpoints within those principles when librarians are creating web pages, library guides, workshops, presentations, and other promotional materials related to the support of OER when working with their various university stakeholder groups. While this chapter's primary focus is

marketing OER, the information and tips provided could also be applied to other library marketing efforts.

Principle of Engagement: Know Your Audience

The UDL principle to provide multiple means of engagement recommends providing multiple ways for learners to engage with material because every learner will differ in how they are motivated to learn. In the context of this chapter, the term “learner” refers to the stakeholder groups that you are likely to interact with at a college or university. According to the principle of engagement, many things can influence how someone learns material. Some of these influences can include subjectivity and background knowledge, culture, and personal relevance.¹ What is important to remember is that one form of engagement will not be optimal for everyone in all contexts. This principle of engagement can also be applied to how librarians and other OER coordinators are marketing services to various stakeholders on academic campuses.

While your library may create marketing and outreach materials that may be seen by stakeholders at every level, such as library guides and websites, there will be times when catering your outreach efforts to a specific group will be necessary in order for the information being presented to be relevant. Those responsible for OER efforts and advocacy on their campuses will usually interact with administrators, faculty, staff departments, and students. Each of these stakeholder groups is likely to have different motivations based on their roles within the campus community and will require different levels of engagement to recruit them for OER and OA support. This section on engagement briefly outlines some of the responsibilities, motivations, and concerns of each of these stakeholder groups. Knowing your audience is crucial in understanding how to effectively market OER on campus, and using some of the checkpoints outlined in the engagement guideline of UDL in your marketing materials can give a subtle nod to the learning preferences of your audience, while also actively demonstrating the importance of using UDL in all aspects of the educational experience.

Academic Administration

The makeup of an academic administration will look slightly different based on the size and organizational structure of your institution, but for the purposes of this chapter, I focus on the roles of provosts, deans, and department chairs. When I started creating marketing material for OER services, I was not aware of how vastly different these roles are and how each role interacts with one another to achieve institutional goals. While all three roles fall within academic affairs at my institution, I quickly realized that I needed to approach each of these groups differently so that the information I presented was relevant and valuable (checkpoint 7.2) when trying to show the value of OER to the academic success of the institution.

The office of the provost typically reports directly to or is a member of an institutional executive team. Like other members of an institutional executive team, the provost is

generally concerned with achieving the goals of the institution's strategic plan and priorities. When talking to the provost's office, it's imperative that librarians and OER advocates can communicate the value of OER in institutional terms that illustrate the connection between OER and institutional missions, such as the institution's strategic plan.² Many institutions will have projects that may be competing for attention and resources. So, ensuring that OER initiatives connect to institutional missions and priorities can help keep the attention of executive administration. This relates to engagement checkpoint 8.1, which encourages the "building of reminders of both the goal and its value."³ Having the ability to align the value of OER and institutional missions could also be critical in gaining leadership support for investment in OER.⁴ Keep in mind that aligning OER initiatives and subsequent outreach efforts to the institution's strategic plan and priorities will need to be done often as strategic plans, priorities, and those in executive positions will likely change over time.

Like most members of the executive administration, the provost will also be concerned about the various ways in which the institution generates revenue. When advocating for OER, it is important to inquire about how the revenue generated by the campus bookstore affects the institution. While OER adoption could positively impact student retention,⁵ librarians and OER advocates should communicate with the bookstore to determine the institution's textbook revenue as opposed to revenue generated by merchandise. When preparing a presentation or outreach material, it is important to anticipate and attempt to reduce what could be considered a threat (checkpoint 7.3). This can help create trust between your efforts and executive administration, and being able to demonstrate little to no loss in revenue for the institution may help gain support from your provost on OER initiatives.

Deans are likely to have concerns similar to the provost's, but your institution's budget structure could affect the roles and responsibilities of the deans on your campus. For example, deans at institutions that are utilizing a responsibility center budgeting (RCB) practice will have more budget authority and be responsible for helping to develop programs that will increase enrollment and revenue for their areas.⁶ Applying checkpoint 7.2 and emphasizing relevance will also be important when creating outreach materials for academic deans. When marketing OER to deans, it's important to effectively communicate not only the alignments between OER and the institutional missions but also emphasize how OER can increase enrollment and retention efforts in their respective areas.⁷ One example of successful marketing to a dean was noted in an OER textbook development case study by faculty at Touro College. The authors noted that while their deans were initially skeptical of OER, they believed that their deans ultimately supported the project because they were able to successfully show "how an OER initiative could help the college fulfill its mission and meet its strategic goals."⁸ Connecting new initiatives—especially those that involve funding of any sort—to the strategic plan is the single best way to secure administrative buy-in.

Department chairs are the members of your academic administration who are more likely to interact with faculty and students in their departments on a regular basis. Department chairs can also be responsible for making textbook choices for certain courses within

their department and are acutely aware of the price of textbooks for their disciplines. During their case study, Magro and Tabaei⁹ also found that their department chair was concerned about the price of textbooks and the effects that these costs have on students. Like the dean, the department chair in the Touro College case study was concerned about the quality of OER, but after hearing a presentation from library personnel that was created specifically for that department and having their specific concerns addressed, the department chair was supportive. Due to the nature of their position and close proximity to faculty and students, marketing to department chairs will be similar to marketing to faculty.

Faculty

As OER advocates on campus, the stakeholder group that you will likely interact with most will be campus faculty. When marketing to faculty, it is important to not only address the cost savings that OER have for students but to also understand the reasons that faculty choose to adopt OER as well as the reasons that they choose not to adopt.¹⁰ While there are many reasons that a faculty member may or may not decide to adopt an OER, there are four concerns that are commonly mentioned in the literature: quality, copyright concerns, technical confidence, and sustainability or time.¹¹ When creating marketing and outreach materials that are meant to reach the broader faculty, it will be important to address those common concerns and misconceptions.

When marketing to faculty, it is also helpful to understand the tenure and promotion guidelines and expectations for not only the institution but for the individual colleges or schools at your institution as well. There may be faculty who are open to OER, but the time needed to search for, evaluate, and adapt these resources is not possible while they are also working toward achieving tenure.¹² If you know that a faculty member is working toward tenure and does not have a lot of extra time, you may offer to locate existing OER for them to evaluate at their leisure rather than telling them how to create an OER for their class. This aligns with checkpoint 7.3 by creating a space where the process of OER adoption has minimal threats or distractions. Marketing your services and expertise in a way that can help the process seem less daunting is critical when talking to your faculty.

Other Staff Departments

Many are familiar with the phrase “it takes a village,” and this is certainly true when marketing OER on campuses. Fostering collaboration and community (checkpoint 8.3) at an institution is one way to create a network of support for OER advocates and their initiatives. There are usually other departments on campus, such as e-learning, student affairs, and enrollment, that are working separately toward goals that are closely related to the goals that OER advocates are trying to achieve.¹³ If possible, forming a committee that brings together expertise from multiple areas on campus will not only create a more successful OER initiative, it will also broaden the scope of OER marketing efforts. Other departments will likely have slightly different email lists or social media audiences than the library. Illustrating cross-department collaboration can also aid when marketing to

academic administration, especially if such collaborative efforts align with the institution's strategic plan or goals.

Students

Marketing the value of OER to the student population may not be difficult, but it is also important to help students become their own advocates for textbook affordability on your campus. When you market to students, it's important to understand some of the concerns that they may be having with the course materials that the faculty are using. While the primary concern for most students will likely be related to cost, other things may be hindering their ability to be successful. Some of these concerns may include the inability to afford access codes, too many publisher subscriptions, ebooks not being mobile-friendly, and various media formats missing from traditional printed textbooks.¹⁴ Helping students understand how OER can alleviate some of these concerns, in addition to having no additional cost, can help bring them on board with OER. It can also encourage them to work with their student government and other student-led organizations to implement resolutions or other changes related to OER use on campus. Student support of OER is important, and teaching them how to be their own advocates for textbook affordability can assist your marketing efforts and overall initiative as well.

Principle of Representation: Create Based on Your Audience

While the UDL principle of engagement is focused on how learners engage with information and resources provided to them, the principle of representation focuses on how learners “perceive and comprehend the information that is presented to them.”¹⁵ There may be barriers, such as language or symbols, that can hinder learners from understanding information. As with the principle of engagement, there is not one form of representation that will be optimal for all learners, so deploying a variety of methods and techniques when you're creating marketing and promotional materials will help you be successful.

When creating promotional materials, such as websites, library guides, flyers, or presentation slides, it's important to understand how the information will be displayed to the stakeholders to ensure that there will be as little confusion as possible. In this section, I discuss the importance of using mixed media on materials that may be seen by all stakeholder groups, anticipating confusion over language and acronyms commonly used in the OER world, and the importance of ensuring that stakeholders can comprehend the importance of the information being presented in marketing and outreach materials. I also provide visual examples of a flyer, presentation slides, and provide you with a list of questions to consider as you are creating your OER marketing materials.

Media Format

When you are creating materials that are likely to be seen by all stakeholder groups, such as webpages or library guides, it's important to use mixed media throughout rather than relying on text. According to the perception guideline, being able to provide multiple

forms of media, such as videos, images, and animations, can make the information in the text easier for some learners to understand.¹⁶ Providing multiple forms of media on materials that are likely to reach a wider audience can also be helpful to those who have text- or language-related disabilities.

An example of a webpage that I created that uses both text and video media is the page devoted to providing stakeholders with information on why it's important to remember accessibility when creating OER (see figure 14.1). On this webpage, I utilize text to explain the importance of making sure that the OER faculty select are accessible. I also embedded video recordings to further elaborate what is being said in the text.

Accessibility and OER

While most OER are created in a digital format, it is important to remember that just because it's digital, does not mean that it is automatically accessible to all students. When using or creating an OER, it is important to keep accessibility in mind so that all students are able to use the content in a way that works best for them to be successful.

To assist faculty through the process of locating, using, and creating accessible OER, we have gathered a variety of resources for you to reference.

Accessibility Services at Texas Tech University

[eLearning Accessibility Services](#) : The eLearning Department provides free accessibility services to help faculty create and add accessibility components to content.

[Student Disability Services](#) : The Student Disability Services Department also has a webpage dedicated to [web accessibility](#) .

[Blackboard Ally](#) : Blackboard Ally is a tool available through the Blackboard Learning Management System that allows faculty to create accessible content.

Resources for Accessible OER

[OER Accessibility Toolkit](#) : Developed by the University of British Columbia, this toolkit provides you with a variety of resources to help you in accessible OER creation.

[BCcampus Open Education Accessibility Toolkit, 2nd Edition](#) : This toolkit is support guide and serves as a supplement to the [BCcampus Open Education Self-Publishing Guide](#) .

Navigation Links:

- [HOME](#)
- [WHY ADOPT OER?](#)
- [WHAT IS AN OER?](#)
- [FIND OER](#)
- [OER AND ACCESSIBILITY](#)
- [CREATE AN OER](#)
- [OPEN EDUCATIONAL RESOURCES ADOPTION INCENTIVE GRANT](#)

Buttons:

- Already using OER?
- Schedule an OER Consultation

Video Player: Accessibility in OER Design (Watch later, Share)

Figure 14.1. A screenshot of the Texas Tech University Libraries “OER and Accessibility” webpage (<https://www.depts.ttu.edu/library/oer/accessibilityoer.php>).

As you are creating materials with mixed media that offer alternatives to make your material more accessible, it is important to keep in mind checkpoints 1.2 and 1.3, which focus on alternative formats for audio and visual materials. For example, if you use or create a video, be sure to provide either a script or ensure that captions are available. You

can also ensure that any text is formatted correctly so that it is understood by the learner if they are using text-to-speech software.

Language and Acronyms

Like many professions, librarianship has its own language and acronyms. The same is true within the world of OER. Representation checkpoint 2.1 states that for information to be accessible to all, vocabulary and other symbols should be clarified. As you're creating marketing materials, try to anticipate language or acronyms that may be confusing to stakeholders.

The use of acronyms and not addressing a specific audience when creating flyers for an OER workshop or event can also create confusion for stakeholders who may not be familiar with a particular topic or subject. The flyer in figure 14.2 will likely make sense to a librarian or other OER advocate, but to a stakeholder who has no prior experience with OER, it may be confusing and could keep them from attending the event.

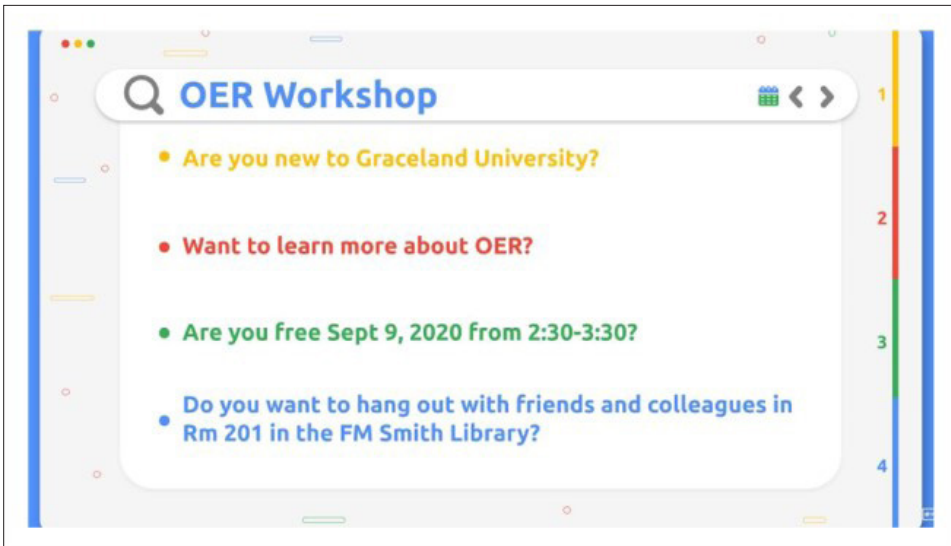


Figure 14.2. An e-flyer for an OER workshop that is not clear to stakeholders. This flyer was created on slidesgo.com for an OER workshop in 2020.

When creating flyers for events or workshops, be sure to clearly indicate your target audience. Let's say your workshop is meant for faculty who are completely new to the world of OER. First, you want to make sure that this target audience is made evident on the flyer in some way. Second, to help your target audience understand the information being presented to them on the poster, you will want to avoid acronyms. As mentioned in checkpoint 2.1, acronyms can be a barrier to those who do not have background knowledge of a particular topic or subject. When you're creating materials for a workshop, be

sure to write out “open educational resources” as opposed to using the acronym OER. Checkpoint 3.1 states that “information is more accessible and likely to be assimilated by learners when it is presented in a way that primes, activates, or provides any pre-requisite knowledge.”¹⁷ That said, the final step in preparing this flyer would be to provide on the flyer a very short description of what will be covered during this presentation; this will help your audience prepare ahead of time. Figure 14.3 is one example of an e-flyer that I created for an OER workshop last year.

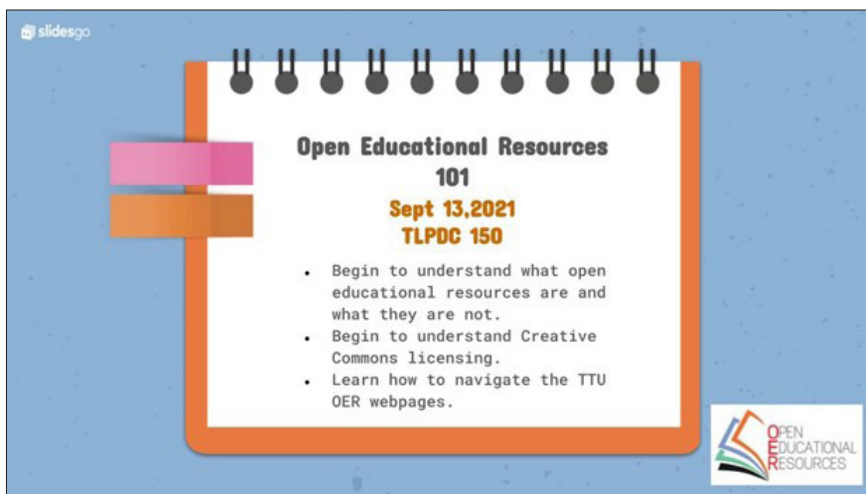


Figure 14.3. Image of an e-flyer created on slidesgo.com. This flyer was used to promote a workshop held in 2021. The photograph also features the official Texas Tech University Libraries OER Logo.

Comprehending the Information in the Materials

Now that your marketing materials are represented in a way that is accessible to your target stakeholder group(s), representation guideline 3 (comprehension) states that it is also important to ensure that the learner can take the information provided and turn it into usable knowledge.¹⁸ One way to do this is outlined in representation checkpoint 3.1. This checkpoint outlines the necessity of providing pre-requisite background knowledge that will assist the learner in both understanding the information being presented to them and can aid in eliminating barriers. For example, one common language misconception is the difference between OER, open access (OA), and library-licensed materials.

The slide in figure 14.4 is part of a presentation I gave to a class of graduate-level students who were interested in creating OER for their undergraduate courses. When I created this presentation, I anticipated that there would likely be some confusion about the differences between these very closely related terms. Anticipating this barrier and addressing it early in the presentation allowed the audience to comprehend the information being provided in the remainder of the presentation. Without eliminating this

OER vs Open Access vs Library Licensed Material		
OER	Open Access	Library Licensed Material
<ul style="list-style-type: none"> • Related to teaching • Useful for teaching, learning, and discourse • Customization is permitted under an open license 	<ul style="list-style-type: none"> • Related to research • Scholarly works created to advance scholarly conversation • Customization is not usually permitted 	<ul style="list-style-type: none"> • Related to research and teaching • Materials paid for by the library and are made available to the campus community • Customization is not permitted

Figure 14.4. Google Slide outlining the different definitions of OER, OA, and library-licensed materials.

barrier, the class may have had a more difficult time understanding other OER concepts that I was covering during that lecture.

It may be that your institution has multiple web pages and/or library guides that are devoted solely to OER. While all that information is helpful, it may be a little confusing to faculty, especially if they are new to the concept of OER or if they only have one specific concern. As you're creating webpages or library guides for OER at your campus, it is important to clearly highlight the critical components of OER. Representation checkpoint 3.2 notes a number of ways that this can be achieved. For example, you may remember that one of the concerns for faculty who are hesitant to adopt OER is about copyright. Many OER advocates are likely to get questions from faculty about the relationship between open licensing—commonly done through Creative Commons licensing—and copyright. When creating marketing material, such as a webpage or library guide, to address these larger concepts it will help to do the following:

- Provide pictures and text from Creative Commons to help explain the various kinds of licenses.
- Devote an entire webpage or library guide tab to explain the differences and connections between Creative Commons and copyright.
- Clearly illustrate the connections between Creative Commons licensing and copyright—a term that many faculty are likely familiar with.
- Provide examples of Creative Commons licensing in use on a more commonly known product, such as Cards Against Humanity.

Marketing Material Creation Guide

Table 14.1 is a Marketing Material Creation Guide that you can use to create marketing materials. Utilizing the UDL principles that have been covered in this chapter so far (engagement and representation), this guide provides you with questions to consider while

you are creating marketing materials. The left column provides the name of the section or subsection of this chapter where this topic is covered, as well as the corresponding UDL principle and/or guideline for you to reference. While the topic of this chapter has focused on OER, this guide may be used for creating any marketing or outreach materials in the library.

Table 14.1. Marketing Material Creation Guide.

Section or Subsection in Chapter	UDL Principle and/or Guideline	Questions to Consider
Audience (stakeholder group)	Engagement	<ul style="list-style-type: none"> • What audience group is the target audience for this marketing material? • What are the roles/responsibilities of the target stakeholder group? • What concerns may this stakeholder group have? • Is the target audience clearly stated in some way on the event/workshop flyer? • What is relevant to this group?
Material Format	Representation-Guideline 1 Perception	<ul style="list-style-type: none"> • Will this material be viewed by multiple stakeholder groups? • What accessibility concerns should I consider for this material? • Should I consider using multiple types of media? • Is this a “harder to grasp” topic that I should devote an entire flyer or presentation slide to?
Language and Acronyms	Representation-Guideline 2 Language and Symbols	<ul style="list-style-type: none"> • Are there common misconceptions in the language that I should address? • Is the use of acronyms appropriate for this group of stakeholders?
Comprehension of Information in Materials	Representation-Guideline 3 Comprehension	<ul style="list-style-type: none"> • Are there any barriers to comprehension that I need to address early? • Are the important topics/concepts clearly highlighted? • Is the information organized in a way that will be easy for the target stakeholder group to follow?

Conclusion

Marketing valuable services to certain stakeholders on a college or university campus can seem a bit daunting, especially if you do not interact with a particular group on a regular basis. My hope is that this chapter demonstrates that one way to make this process less daunting is to apply some of the universal design for learning principles, guidelines, and checkpoints when you are planning and creating a marketing strategy.

The UDL principle of engagement establishes that learners are more motivated to learn information when they see the information being presented as relevant. Every university stakeholder group is likely to be motivated by different things due to their varying roles and responsibilities, so personalizing presentations and materials is important for getting buy-in. The principle of representation focuses on the ways in which learners comprehend information presented to them. As you are creating marketing materials, it's important to address relevant information for your target stakeholder group and ensure barriers to comprehension, such as discipline-specific language or acronyms, are nonexistent. While advocating for OER can sometimes seem like an uphill battle, creating outreach materials to demonstrate value to institutional stakeholders does not have to be an additional obstacle to overcome.

Notes

1. "Universal Design for Learning Guidelines version 2.2," CAST, last modified 2018, <https://udlguidelines.cast.org>.
2. Scott Walter, "Communicating Value Through Strategic Engagement," *Library Management* 39, no. 3/4 (2018): 161.
3. "Universal Design for Learning Guidelines," CAST.
4. Walter, "Communicating Value," 154
5. Veronica McGowan, "Institution Initiatives and Support Related to Faculty Development of Open Educational Resources and Alternative Textbooks," *Open Learning* 35, no. 1 (2020): 26.
6. Nathan F. Harris, "Working Together to Lead the College to Bigger and Better Things: Exploring the Relationship Between Academic Deans and Senior Administrative Teams," *New Directions for Higher Education*, no. 189 (2020): 41–42.
7. Angela Murphy, "Open Educational Practices in Higher Education: Institutional Adoption and Challenges," *Distance Education* 34, no. 2 (2013): 203.
8. Juliana Magro and Sara V. Tabaei, "Results from a Psychology OER Pilot Program: Faculty and Student Perceptions, Cost Savings, and Academic Outcomes," *Open Praxis* 12, no. 1 (2020): 85.
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10. Lane Fischer, Olga Belikov, Tarah K Ikahihifo, John Hilton, David Wiley, and M. Troy Martin, "Academic Librarians Examination of University Students' and Faculty's Perceptions of Open Educational Resources," *Open Praxis* 12, no. 3 (2020): 399.
11. Fischer et al., "Academic Librarians Examination," 400; Troy Martin and Royce Kimmons, "Faculty Members' Lived Experiences with Choosing Open Educational Resources," *Open Praxis* 12, no. 1 (2020): 136, <https://doi.org/10.5944/openpraxis.12.1.987>; Sinead Harold and Vivien Rolfe, "'I Find the Whole Enterprise Daunting': Staff Understanding of Open Education Initiatives within a UK University," *Open Praxis* 11, no. 1 (2019): 77.
12. Olga Maria Belikov and Robert Bodily, "Incentives and Barriers to OER Adoption: A Qualitative Analysis of Faculty Perceptions," *Open Praxis* 8, no. 3 (2016): 242–44.
13. Kerry Walton, "Role of Campus Community in Open Educational Resources: The Benefits of Building a Collaborative Relationship with Campus IT and Distance Education Departments," *Library Trends* 69, no. 2 (2020): 397.
14. Vanessa Dennen and Lauren Bagdy, "From Proprietary Textbook to Custom OER Solution: Using Learner Feedback to Guide Design and Development," *Online Learning* 23, no. 3 (September 2019): 9, <https://doi.org/10.24059/olj.v23i3.2068>.
15. "Universal Design for Learning Guidelines," CAST.
16. Ibid.
17. Ibid.
18. Ibid.

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