

“Rebus is a godsend! I rely heavily on their amazing guides and templates; it’s a thorough and thoughtful approach to creating open textbooks that both makes the process easier, and the end product better.”

— Allison Brown, Digital Publishing Services Manager, SUNY Geneseo

“The Rebus guide is required reading for OER projects big and small. It helped me organize my textbook project for grant applications and anticipate potential issues on a large multi-site team. I owe the plaudits I get for organization to Rebus for creating such an accessible and practical resource!”

— Matt DeCarlo, Assistant Professor of Social Work, Radford University

“The Rebus guide is an invaluable resource that has helped me plan publishing projects within my organization. It includes document templates, links to additional resources, and great advice that save time and ensure a thoughtful approach. I’d recommend this guide for anyone looking to gain valuable insight on developing open texts.”

— Alisa Lazear, Community & Content Manager, Canadian Legal Information Institute



## The Rebus Guide to Publishing Open Textbooks (So Far)



# The Rebus Guide to Publishing Open Textbooks (So Far)

*APURVA ASHOK AND ZOE WAKE HYDE*

*ELIZABETH MAYS*

REBUS COMMUNITY  
MONTRÉAL



*The Rebus Guide to Publishing Open Textbooks (So Far) by Apurva Ashok and Zoe Wake Hyde is licensed under a Creative Commons Attribution 4.0 International License, except where otherwise noted.*

You can find free copies of this book in multiple formats (web, PDF, EPUB & editable) at: <https://press.rebus.community/the-rebus-guide-to-publishing-open-textbooks/>

*No matter the stage of your project, a Rebus Community homepage is a place to build your team, discuss your book's progress, and attract potential supporters. To get yours, follow these steps:*

1. Start your project at [www.rebus.community](http://www.rebus.community).
2. Click "Create a Project"
3. Tell us about your book, team, audience, subject, and license.
4. Use *The Rebus Guide to Publishing Open Textbooks (So Far)* to create your book.

*If you have any questions, we're here to help. Ask the community at [www.rebus.community/c/help-questions](http://www.rebus.community/c/help-questions).*

*The Rebus Guide to Publishing Open Textbooks (So Far) was produced by the Rebus Community, an initiative of the Rebus Foundation.*

*The Rebus Community provides a new, collaborative process for creating open textbooks and ancillary materials. We are building tools and resources to support open textbook publishing, and to bring together a community of faculty, librarians, students, and others working with open textbooks around the world.*

*Join us at [www.rebus.community](http://www.rebus.community).*

# Contents

Acknowledgements	xi
Introduction	1
Making Open Textbooks: A Video Guide	3
Feedback and Suggestions	4
About the Team	5
Accessibility Assessment	6
Licensing Information	10
Version History	11
Other Open Textbooks Created with Rebus Community Support	13



This book is a culmination of more than two years of collaboration, innumerable conversations and exchanges, and a wide range of collective knowledge and experience. We are extremely grateful to everyone in the Rebus Community who worked with us to learn the ins-and-outs of OER publishing and let us be a part of their open textbook projects. We appreciate your willingness to trial new methods and models, and for your support and encouragement as we began creating the guide to capture what we learned. None of this would be possible without you!

In particular, we'd like to thank the following project leads, and all those involved in their teams:

- |                     |                          |                     |                      |
|---------------------|--------------------------|---------------------|----------------------|
| • Adriano Palma     | • Christina Hendricks    | • Justin Marlowe    | • Rajiv Jhangiani    |
| • Allison Brown     | • Danielle Mead Skjelver | • Katie Kirakosian  | • Ryan Hersha        |
| • Amanda Taintor    | • Dave Braunschweig      | • Linda Frederiksen | • Sarah Hare         |
| • Andre Mount       | • Dave Dillon            | • Liz Mays          | • Scott Clifton      |
| • Ann Ludbrook      | • Deborah Amory          | • Luis R. Izquierdo | • Sharon Kioko       |
| • Arthur Gill Green | • Douglas Giles          | • Maha Bali         | • Stan Yu            |
| • Beau Branson      | • Eran Asoulin           | • Mark Poepsel      | • Susan Jones        |
| • Benjamin Martin   | • George Matthews        | • Michelle Ferrier  | • Timothy Robbins    |
| • Billy Meinke-Lau  | • Heather Exner-Pirot    | • Michelle Schwartz | • Valery Vinogradovs |
| • Brian Barnett     | • Heather Salazar        | • Michelle Reed     | • Werner Westermann  |
| • Carrie Cuttler    | • Jennifer Paris         | • Nadine Aboulmagd  |                      |
| • Cathie LeBlanc    | • Jessica Kirchner       | • Naomi Wahls       |                      |
| • Chelsea Green     | • Julie Ward             | • Paul Hackett      |                      |

There are a few more people whose involvement we must acknowledge: David Szanto, your sharp editor's eyes and pattern-spotting, connections-making abilities were invaluable to making this book more cohesive. Thanks also for your work directing and editing the video series version of the guide, so it's available in yet another format for others to discover and use. Mei Lin, thank you for creating transcripts and captions for the video series and making sure they are more accessible. Liz Mays, your early efforts towards the guide back in 2018 got us started, and we're grateful that you come back to contribute your expertise in our sections on editing and marketing. Billy Meinke-Lau; Jess Mitchell and the team at IDRC; Lauri Aesoph, Josie Gray, and the team at BCcampus Open Education; Deb Quentel — thanks for letting us pick your brains, build on your work, and use your tools as we put this guide together.

Thanks to Hugh McGuire for painting the big picture of how open tools, process, and books can change the world — it motivated us to continue taking small steps and contribute what we can towards that future. And speaking of open tools, thank you to the team at Pressbooks for creating the software that lets us easily create and share this collective knowledge with the widest possible audience!

Finally, thank you to all the readers and users of this guide — for giving it a go and for letting this book become part of your universe, and in so doing, for becoming part of its community!



From the beginning, the Rebus Community as an organization has been dedicated to building a new, collaborative model for open textbook creation in partnership with the OER community. Our idea of this model has also always been that it be *replicable* and *scalable*, meaning that anyone – including you, the undoubtedly intrepid OER creator reading this guide – should be able to use it to create and adapt more and more OER without running into the limitations of traditional publishing models. From early on, we knew we had to think hard about how to actually go about achieving this vision – not only how we would develop our model and share it with the world, but also how it could then continue to grow and change over time as the community needs and values evolve.

There's no one way to meet that goal, but this guide, and how we went about creating it, is one of them. It is the result of thousands of hours of work by dozens of open textbook creators who were generous enough to allow us to join forces and learn about open textbook publishing together. We have spent many months researching, creating resources, problem solving, celebrating, commiserating, and more with the projects we've supported – all the while being responsive to their needs and learning not just from them, but also from the wider OER community.

This guide is our effort to distill that learning and experience into a comprehensively documented process for you to use, in part or in whole, keeping as true to or deviating as much from it as you choose. While it does a deep dive into the publishing process, it also includes summaries and videos for each section to give you an easier pathway in. In addition, the templates and examples throughout keep it grounded very much in the practical. This is a useful book. It's made to be used. It's also made to be used in whatever way is useful to you, whether that means reading it start to finish, out of order, in pieces, skimming quickly, or any other way you can find.

We've also worked hard to make it easy to tackle big questions like how to make sure your content is accessible, and how to manage a big team of volunteer contributors. Our philosophy of creation as a collaborative act is woven throughout, as is the belief we share with the community that OER content should be created to serve all students, with all their unique contexts, understandings of the world, needs, and goals.

The goal of this guide is very simply to help you create quality OER, build a community around it, and have it make a positive impact in the world. We believe that those in the classroom – both instructors and students – know best what they need to be successful in their teaching and learning. What they and those supporting them on campuses (librarians, instructional designers, etc.) don't always know is how to go about creating and publishing their content. To do so, they have typically had to invent a process, or pull together information from many sources. But, true to the open education ethos, there is no need to reinvent the wheel!

This guide offers concrete, practical steps to go from the idea of a textbook (or other OER) to a thriving community gathered around a robust resource being used in classrooms around the world. It's also just as useful if you want to work with a small team on a resource for your own classroom, that may or may not end up being used by others. At every stage, you get to decide what works best for you. Whether you're a faculty member acting as lead author or editor, or a librarian or OER program manager tasked with supporting creation on your campus, we've got you covered.

The final critical piece of this guide is the fact that it is a living document, and will continue to change and improve over time. This is reflected in the title, of course, and we very much want the community at large to be part of the evolution. So, if you've read or used this guide and have some thoughts – maybe something worked well or not, maybe you came up with another approach, maybe there's something missing, or something is overly-complicated – please share them with us on the Rebus Community project home. We also encourage you to share this resource with anyone you know who is starting out on their OER creation journey, or who is looking to add some more tools to their belt.

The Rebus Community has never sought to be the gatekeepers of knowledge. We don't want to keep it for ourselves and dole it out to a select few as we see fit. Knowledge shouldn't be contained, and knowledge should never come from only one source. These principles inform the very best of what open education has to offer, and we take them very seriously. This guide is a prime example of that philosophy, and we hope it serves you well on your adventures.



If you're looking for a light overview of OER creation, check out the video series version of this guide. *Making Open Textbooks: A Video Guide* provides a brief summary of each of the major phases of creation. The short videos present the roles, models, and guidelines that make up the process of creating and publishing open textbooks. From project conception and rounding up a team of collaborators, to creating, editing, and reviewing your content, all the way through to release, marketing, adoptions, and revisions, these videos summarize the many steps along the way.



One or more interactive elements has been excluded from this version of the text. You can view them online here:  
<https://opentextbooks.uregina.ca/rebusguidepubopentextbooks/?p=78#oembed-1>

*Making Open Textbooks: A Video Guide* features Zoe Wake Hyde. It is edited and directed by David Szanto. Transcript and captions provided by Mei Lin.

We are actively and enthusiastically soliciting feedback from instructors, faculty, administrators, OER program managers, librarians, instructional designers, students, and others using this book. You can leave feedback and suggestions in the Rebus Community project home at <https://www.rebus.community/c/open-textbooks-in-development/the-rebus-guide-to-publishing>.

## Authors

**Apurva Ashok** studied literature and marketing at McGill University and completed the Master of Publishing program at Simon Fraser University. Her experience ranges across academic publishing, media, social justice, and volunteer work. In 2015, she co-founded *Harf*, a student-run journal on South Asian studies. Apurva strongly believes in translating knowledge across places and people and in the value of greater critical thinking for all.

**Zoe Wake Hyde** worked in media communications and academic administration in New Zealand before completing the Master of Publishing program at Simon Fraser University. Having gained an alternative view of academic publishing, she is now focused on creating value-exchange systems that support better, more democratic access to knowledge and learning.

## EditorS

**David Szanto** has worked in a number of different professions, including book publishing, new product and service development, innovation consulting, film finance, marketing-communications, and academia.

## Contributors

**Elizabeth Mays** is director of sales and marketing for PressbooksEDU and an adjunct professor at the Walter Cronkite School of Journalism and Mass Communication at Arizona State University. Previously she served as marketing manager at the Rebus Community and as an assistant director at Arizona State University. She is the editor of *A Guide to Making Open Textbooks With Students* and the co-editor of *Media Innovation & Entrepreneurship*, both of which were collaboratively built works published by the Rebus Community.

## A note from the Rebus Community

We are working to create a new, collaborative model for publishing open textbooks. Critical to our success in reaching this goal is to ensure that all books produced using that model meet the needs of all those who will one day use them. To us, open means inclusive, so for a book to be open, it must also be accessible.

As a result, we are working with accessibility experts and others in the OER community to develop best practices for creating accessible open textbooks, and are building those practices into the Rebus model of publishing. By doing this, we hope to ensure that all books produced using the Rebus Community are accessible by default, and require an absolute minimum of remediation or adaptation to meet any individual reader's needs.

While we work on developing guidelines and implementing support for authoring accessible content, we are making a good faith effort to ensure that books produced with our support meet accessibility standards wherever possible, and to highlight areas where we know there is work to do. It is our hope that by being transparent on our current books, we can begin the process of making sure that accessibility is top of mind for all authors, adopters, students, and contributors of all kinds on all our open textbook projects.

Below is a short assessment of eight key areas that have been assessed during the production process. The checklist has been drawn from the BCcampus Open Education Accessibility Toolkit. While a checklist such as this is just one part of a holistic approach to accessibility, it is one way to begin our work on embedded good accessibility practices in the books we support.

Wherever possible, we have identified ways in which anyone may contribute their expertise to improve the accessibility of this text.

We also welcome any feedback from anyone who encounters the book and identifies an issue that needs resolving. This book is an ongoing project and will be updated as needed. If you would like to submit a correction or suggestion, please do so using the Rebus Community Accessibility Suggestions form.

## Accessibility Checklist

### Checklist for Accessibility in Webbook

Area of Focus	Requirements	Pass?
<b>Organizing Content</b>	Content is organized under headings and subheadings	Yes
<b>Organizing Content</b>	Headings and subheadings are used sequentially (e.g. Heading 1. Heading 2, etc.) as well as logically (if the title is Heading 1 then there should be no other Heading 1 styles as the title is the uppermost level)	Yes
<b>Images</b>	Images that convey information include Alternative Text (alt-text) descriptions of the image's content or function	Not Applicable
<b>Images</b>	Graphs, charts, and maps also include contextual or supporting details in the text surrounding the image	Not Applicable
<b>Images</b>	Images do not rely on colour to convey information	Yes
<b>Images</b>	Images that are purely decorative contain empty alternative text descriptions. (Descriptive text is unnecessary if the image doesn't convey contextual content information)	Yes
<b>Tables</b>	Tables include row and column headers	Yes
<b>Tables</b>	Tables include a title or caption	Yes
<b>Tables</b>	Tables do not have merged or split cells	Yes
<b>Tables</b>	Tables have adequate cell padding	Yes
<b>Weblinks</b>	The weblink is meaningful in context, and does not use generic text such as "click here" or "read more"	Yes
<b>Weblinks</b>	Weblinks do not open new windows or tabs	Yes
<b>Weblinks</b>	If weblinks must open in a new window, a textual reference is included in the link information	Not Applicable
<b>Embedded Multimedia</b>	A transcript has been made available for a multimedia resource that includes audio narration or instruction*	Yes
<b>Embedded Multimedia</b>	Captions of all speech content and relevant non-speech content are included in the multimedia resource that includes audio synchronized with a video presentation	Yes
<b>Embedded Multimedia</b>	Audio descriptions of contextual visuals (graphs, charts, etc.) are included in the multimedia resource	Not Applicable
<b>Formulas</b>	Formulas have been created using MathML	Yes
<b>Formulas</b>	Formulas are images with alternative text descriptions, if MathML is not an option	Not Applicable
<b>Font Size</b>	Font size is 12 point or higher for body text	Yes
<b>Font Size</b>	Font size is 9 point for footnotes or endnotes	Yes
<b>Font Size</b>	Font size can be zoomed to 200%	Yes

\*Transcript includes:

- Speaker's name
- All speech content
- Relevant descriptions of speech
- Descriptions of relevant non-speech audio
- Headings and subheadings

This book is licensed under a Creative Commons Attribution 4.0 license except where otherwise noted.

This license allows for reuse, adaptation, remixing, and redistribution of content, so long as you attribute it to the original authors, indicate if changes are made, and link to the original, free content, found at <https://press.rebus.community/the-rebus-guide-to-publishing-open-textbooks/>.

## **Please credit us as follows:**

### *Redistributing the book verbatim:*

This guide is created by Apurva Ashok and Zoe Wake Hyde, edited by David Szanto, and produced with support from the Rebus Community. The original is freely available under the terms of the CC BY 4.0 license at <https://press.rebus.community/the-rebus-guide-to-publishing-open-textbooks/>.

### *Revised or adapted versions:*

This work is based on original content created by Apurva Ashok and Zoe Wake Hyde, edited by David Szanto, and produced with support from the Rebus Community. The original is freely available under the terms of the CC BY 4.0 license at <https://press.rebus.community/the-rebus-guide-to-publishing-open-textbooks/>.

### *Individual chapters or pieces:*

This work is [created by OR based on original content created by] Apurva Ashok and Zoe Wake Hyde, edited by David Szanto, [other authors/editors as applicable], and produced with support from the Rebus Community. The original is freely available under the terms of the CC BY 4.0 license at <https://press.rebus.community/the-rebus-guide-to-publishing-open-textbooks/>.

This page provides a record of edits and changes made to this book since its initial publication. Whenever edits or updates are made in the text, we provide a record and description of those changes here. If the change is minor, the version number increases by 0.1. If the edits involve substantial updates, the edition number increases to the next whole number.

The files posted alongside this book always reflect the most recent version. If you find an error in this book, please let us know in the Rebus Community project home.

## Version History

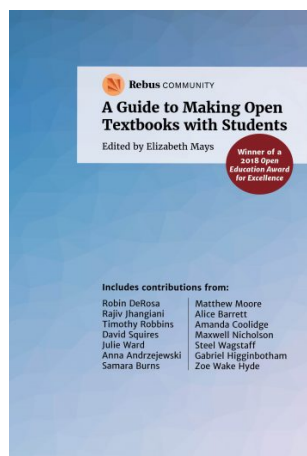
Version	Date	Change	Affected Web Page
1.0	October 2018	Original	
2.0	30 September 2019	<p>Second edition published, with updated book information and metadata. It includes the following additions:</p> <ul style="list-style-type: none"> <li>• 4 Steps to Starting an Open Textbook Project</li> <li>• Acknowledgements</li> <li>• Introduction</li> <li>• Praise for ‘The Rebus Guide to Publishing Open Textbooks (So Far)’</li> <li>• Building a Team Summary</li> <li>• Project Scoping Summary</li> <li>• Authoring and Content Creation Summary</li> <li>• Editing Summary</li> <li>• Editing Overview</li> <li>• Hiring Editors</li> <li>• Peer Review Process Summary</li> <li>• Marketing and Communications Summary</li> <li>• Marketing and Communications Overview</li> <li>• Release Summary</li> <li>• Release Overview</li> <li>• Adoption Summary</li> <li>• Adoption Overview</li> <li>• Improvements and Maintenance Summary</li> <li>• Improvements and Maintenance Overview</li> <li>• Adaptations Summary</li> <li>• Adaptations Overview</li> <li>• Making Open Textbooks: A Video Guide</li> <li>• Feedback and Suggestions</li> <li>• About the Team</li> <li>• Accessibility Assessment</li> <li>• Licensing Information</li> <li>• Version History</li> </ul>	Entire book.
	30 September 2019	<p>Following chapters or sections edited for typos, Canadian spelling, or updated for broken links and other information:</p> <ul style="list-style-type: none"> <li>• About Rebus Community</li> <li>• Building a Team Overview</li> <li>• How to Build a Leadership Team</li> <li>• Recruitment Guide</li> <li>• Roles and Responsibilities</li> <li>• Managing Volunteers</li> <li>• Engagement Guide</li> <li>• Project Scoping Overview</li> <li>• Project Summary Template</li> <li>• Authoring and Content Creation Overview</li> <li>• Author Guide Template</li> <li>• Peer Review Process Guide</li> <li>• Review Guide Template (Google Docs)</li> <li>• Review Guide Template Hypothes.is)</li> <li>• Review Statement Template</li> <li>• Other Open Textbooks Created with Rebus Community Support</li> </ul>	Entire book.
	9 June 2020	<p>Added:</p> <ul style="list-style-type: none"> <li>• [Example] Proposed Formatting Workflow</li> <li>• [Example] Formatting Accessible Tables</li> </ul>	Entire book

# Blueprint for Success in College and Career

*Dave Dillon*

This text focuses on study skills, time management, career exploration, health, and financial literacy. *Blueprint for Success* is a winner of the Textbook & Academic Authors Association Award for Textbook Excellence and the Open Education Award for Excellence.

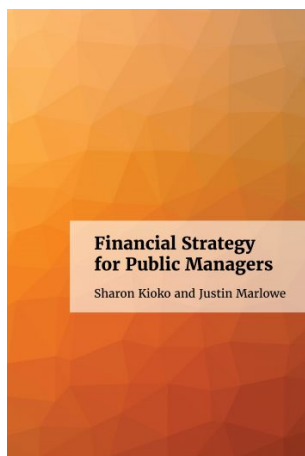
## Making Open Textbooks with Students



*Ed. Elizabeth Mays*

A handbook for faculty interested in practicing open pedagogy by involving students in the making of open textbooks, ancillary materials, or other Open Educational Resources.

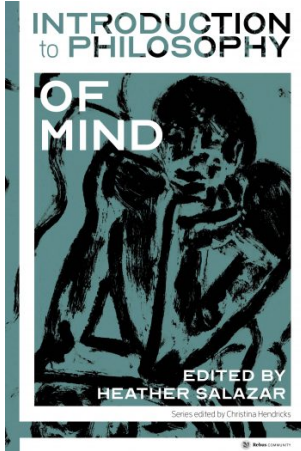
## Financial Strategy for Public Managers



*Sharon Kioko and Justin Marlowe*

This book offers a thorough, applied, and concise introduction to the essential financial concepts and analytical tools that today's effective public servants need to know.

## Introduction to Philosophy: Philosophy of Mind



*Eran Asoulin, Paul Richard Blum, Tony Cheng, Daniel Haas, Jason Newman, Henry Shevlin, Elly Vintiadis, Heather Salazar (Editor), and Christina Hendricks (Series Editor)*

The first in a nine-book series, *Philosophy of Mind* surveys the central themes in philosophy of mind and places them in a historical and contemporary context intended to engage first-time readers in the field.

These books and more are available for free in multiple formats (web, PDF, EPUB & editable) at [press.rebus.community](https://press.rebus.community).