As I learn about OER, the moral clarity of using materials that are entirely free and clear for pedagogical
distribution is obvious and appealing. The pandemic has heightened an already building urgency
to keep the costs of course materials low. For my class this fall, I haven't required students to buy
anything at all.

Caroline Sherman
Catholic University of America
History Department, 2020

In a 2018 essay in the Open Pedagogy Notebook entitled, “The Time Is Now: A Call to Open up History,”
Thomas Peace, a Canadian historian, described the ethical and practical arguments that made him a “slow
convert” to the movement to adapt, adopt, and author openly licensed materials, many of them online.1 In the
United States, no equivalent essays have so far been published in mainstream academia, and The Chronicle of
Higher Education has afforded the twenty-year-old movement for openly licensed materials incomplete coverage
at best. Yet, according to a 2019 Inside Higher Ed survey,2 thirty-nine percent of all faculty polled fully supported
the increased use of educational technologies. An August 2020 survey by Every Learner Everywhere and Tyton
Partners saw the proportion of instructors who see online learning as effective increase to forty-nine percent
from thirty-nine percent in May.3 And, in 2020, the American Historical Association created a page of Remote
Teaching Services, “professionally vetted by historians,” addressing a persistent worry from faculty about quality
control in open resources. While the focus of the AHA’s webpage is not specifically Open Educational Resources
(OER), many open access databases, such as La Florida: Digital Archive of the Americas and textbooks like Sage
American History, have gotten the emergency stamp of approval.4

Despite open resources’ steadily growing presence in historical research and teaching, they still have a way
to go before being accepted as a first-choice solution. This article aims to provide an overview of the unique
opportunities for innovative pedagogy that have entered the history field with OER—textbooks, informational
and experiential websites, and interactive digital tools for scholarly research—while reviewing current challenges
to their uptake.

Textbooks and Teaching Modules

The many definitions of open educational resources point to the diversity of the field; according to UNESCO,
these are “teaching, learning, and research materials in any medium, digital or otherwise, that reside in the
public domain or have been released under an open [e.g. Creative Commons or public-domain-equivalent]
license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions.”5

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4https://www.historians.org/teaching-and-learning/digital-history-resources
Given the origins of the movement in lowering the costs of education around the world, for the majority of scholars it has translated, first and foremost, to “open textbooks.” Therefore, the impetus to adopt OERs has often been exclusively tied to affordability—to the exclusion of their scholarly contribution or pedagogical qualities. A proper overview of the field is not typically provided as a comprehensive service of academic libraries or university centers that support teaching and learning, and such reviews are often only available upon request.

While a casual reader of The Chronicle of Higher Education would be aware of the existence of textual OERs, the first barrier to their actual adoption is that of discoverability. A comment from a professor of American history about the lack of an “OER clearinghouse or search engine, with several filters,” is typical. Two dedicated OneSearch-type engines, OASIS and the Mason OER Metafinder, are, in fact, currently live and undergoing constant improvement in their treatment of metadata. Most scholars without a title or author in mind, however, turn to time-tested national repositories that feature on most libguides: OER Commons (an online library founded in 2007 and organized by module and education level), OpenStax (an educational technology initiative started in 2012 and largely dedicated to beginner textbooks, with some additional materials), and the Open Textbook Library (a smaller, dedicated repository also launched in 2012). In a history textbook search, these repositories cite P. Scott Corbett's U.S. History, History in the Making: A History of the People of the United States of America to 1877, The American Yawp, World History: Cultures, States and Societies to 1500, and Western Civilizations: A Concise History, Volume 1. Because some textbooks exist on smaller, dedicated websites, this list is not exhaustive, although its general focus on either U.S. or global history is reflective of the field as a whole.

How do the above open textbooks fare along measurable metrics? The Open Textbook Library, the only fully peer-reviewed OER repository, rates most of these 4 out of 5, with American Yawp netting a superlative 4.5 stars; the number of reviews (by solicited faculty) ranges from the single digits to twenty or so. A quantitative study of the uptake of American Yawp has concluded that student learning outcomes actually improved when moving away from a traditional American history textbook. These results correspond to other study findings comparing analog to open materials in the same subject, in which both students and teachers perceived the OERs to be of “at least equal quality.”

Other metrics, such as numbers of downloads where available, may matter just as much for the assessment of an open digital resource. For example, Helmut Loeffler wrote his Introductory Guide to Ancient Civilizations after he perceived whole populations being excised from the classic narrative. Loeffler, a history professor at Queensborough Community College, City University of New York (CUNY), wrote the book in the spirit of social justice aimed to include more groups in a new text. The resultant work does not have an affiliation with a major university publisher and does not come up in a repository search. It is housed in the OER section of CUNY Academic Works, an institutional repository that provides access to faculty research and scholarship. The publication, which also has a 4.5 rating on Amazon (where it is published at cost), recorded 3,500 downloads on the CUNY Academic Works website in 2019, with the numbers going up during the Covid-19 pandemic to 12,353 across 147 countries as of November 2021. This result, as Loeffler has pointed out, eclipses the typical run of any history hardcover, while the geography of the downloads—mostly from Eastern Africa and India—point

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to the importance of free and open texts for English-speaking institutions around the world.10

Yet, reservations about open textbooks persist among many instructors. Explanations that free textbooks “do not have the content, writing, or editing quality I seek” are typical, and associating copyright with value often prevails. The low level of awareness of the Creative Commons, an organization that grants a variety of legal public licenses enabling sharing and revising and which has gone hand in hand with the development of open educational resources, might be to blame. Perhaps more pertinently, the peer review culture that open textbooks tend to bypass may also be responsible for some of this apprehension: The imprimatur granted by colleagues’ positive assessment is hard for many to turn down.11 The reliance of the open field on uncertain institutional and grant funding in the absence of credits for tenure and promotion also leads to resources often having less polish than their counterparts that go the route of commercial publishing.

Issues of quality—real and perceived—aside, the pared-down narrative and insufficiency of enhanced features characteristic of some (though not all) open-source textbooks may automatically sway readers against them.12 The extra perks of many images, live links, timelines, and videos often constitute an unaffordable luxury. Loeffler has described how the time and resources at his disposal had made anything beyond the authoring of a basic text impossible.13 While the affordances of the open license make it easy to build on additions to the existing textbooks (or swap out undesired chapters), faculty just learning about their options rarely hear about this as a possibility. For instance, Caroline Sherman, who teaches the history survey course at the Catholic University of America, offers the following assessment about the open option in comparison to the texts she typically assigns (Grafton and Bell, The West: A New History and Adelman et al., Worlds Together, Worlds Apart): “The material is clear, and the stripped-down narrative might be easier for students to follow. It doesn’t seem like quite the same invitation to opulence as my preferred textbooks, but if half of the class is struggling to buy a textbook, then the textbook isn’t going to read to them as an invitation at all.”14 Sherman’s decision was ultimately not to assign a commercial text during the pandemic, but other instructors—for instance, those who teach as adjuncts—often do not have this choice. Others may hesitate to make changes to their pedagogy given a dearth of positive messaging and competing rationales and incentives.

Yet what of those textual resources that do not lay a claim to competing with traditional ones, but actually complement them? The OER Commons aggregate website lists over two hundred items under the history rubric, most of them not textbooks but varied teaching modules. Such a search might reveal, for instance, an inquiry-based learning unit from the Rockefeller Archive Center based on document analysis of primary sources from the RAC’s 1933-45 Refugee Scholar Program. The unit contains an exercise that “ask[s] students to consider what foundations can do in times of global crisis by placing them in the role of Rockefeller Foundation (RF) program officers during World War II.”15 Other open teaching materials include syllabi, homework assignments, slide presentations, diagrams/illustrations, classroom activities, and much more. All these objects are designed to exist alongside (or, potentially, replace) the textbook and enrich the classroom experience, and their license allows the instructors to modify, reorganize, and distribute the information within as they see fit, with attribution. Communicating the variability and built-in flexibility of OER—and carefully curating resources that might be of interest to the specific history department—is a task for colleges’ auxiliary services, with support from the administration a necessary condition for this message to be heard.

10 See Helmut Loeffler, “Experiencing with Authoring and Using an OER Textbook,” paper presented at the 16th Annual Open Education Conference, 30 October 2019. The author thanks Dr. Loeffler for the conversation clarifying some of the points made in his presentation.
12 Jordan Reed, “The Textbook as Technology in the Age of Open Education Resources,” The History Teacher 54 no. 4 (August 2019), 637-651.
13 Helmut Loeffler, “Experiencing with Authoring and Using an OER Textbook.”
15 https://www.oercommons.org/authoring/58232-refugee-scholar-primary-source-workshop/view
Informational Websites and Interactive Experiences

When Michael Hart created the first-ever e-book in 1971 by making the U.S. Declaration of Independence available to other computer users at the University of Illinois, the idea of digitizing texts for open consumption was as novel and unfamiliar as computers themselves. The eventual product of his efforts, Project Gutenberg, became the first digital library. Hart originally typed in 313 texts himself, and Project Gutenberg now contains over 60,000 items in the public domain. Meanwhile, Hart’s pioneering thoughts about how technology can serve to increase access to knowledge, expressed in his 1995 book, *A Brief History of the Internet*, have laid the ground for the open culture movement. His torch was later taken up by the literacy advocate Eric Eldred and the legal academic Lawrence Lessig, who with Hal Abelson founded the Creative Commons in 2001. Those activists pushed back against the Sonny Bono Copyright Term Expansion Act (1998) to advocate for a cooperative internet true to its original premise.

In 2006, Roy Rosenzweig, who had founded one of the world’s first digital history hubs (the Center for History and New Media at George Mason University, now the Roy Rosenzweig Center), reviewed the five-year-old open educational resource *par excellence*, Wikipedia (Hart had actually thought of an “Internetpedia” in 1993, but left it at the planning stage). Rosenzweig’s article “Can History Be Open Source? Wikipedia and the Future of the Past?” compared the website favorably to analog encyclopedias, judged it to be a fine example of collective history, and bemoaned the tradition-bound individualism at the heart of much historical scholarship.16 This endorsement paved the way to academe’s acceptance of Wikipedia as a conduit of information and a source to grapple with, if not quite an authoritative fount of wisdom. It was also a vote of confidence for the collaborative and iterative work of sharing materials, which lies at the heart of open educational resources.

Since its founding, the influential Roy Rosenzweig Center has produced over a hundred projects in historical research and education using digital media and technology.17 A number of these initiatives have been released under a Creative Commons license, enabling their data to be downloaded and reused in a scholarly context. They include: *The Lost Museum* (a recreation and study of P.T. Barnum’s American Museum using 3D technologies); *Mapping Early American Elections* (centered on interactive maps and visualizations); and *World History Sources* (conceived as a course website with extra resources). In 2019, the Center and the American Social History Project at the City University of New York announced that a textbook of record that Rosenzweig had co-authored, *Who Built America: Working People and the Nation’s History*, was to be made into an OER with updated content and multimedia teaching resources.18 The public statements also alluded to the initiative’s objective to create a sustainable environment for another open resource, the U.S.-focused George Mason University website, *History Matters*.

While the majority of digital history sites remain under copyright—including most at the Rosenzweig Center—several university projects have followed the lead of pioneering initiatives to open up their databases for downloading, sharing and (re-)use.19 Others, trying to make their collections not just open but user-friendly, have started far-reaching projects but at times encountered challenges that have prevented them from completing their work. A case in point is CUNY’s Philip C. Van Buskirk Archive, which has digitized the first seven years of a nineteenth-century sailor’s unpublished and hand-illustrated personal journals. A 2017 notice on the site proclaims the archive “free and publicly available for reading and searching and… eventually also… available to interested scholars to annotate, index, and tag in XML.” While the long-term hope is “for a multimedia site, hosting also color illustrations that are part of the original journals, images of Van Buskirk, anything pertinent

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17 See the Rosenzweig Center website: [https://rrchnm.org/](https://rrchnm.org/)
19 See, for instance, the Behind the Veil project at Duke University: [https://repository.duke.edu/dc/behindtheveil](https://repository.duke.edu/dc/behindtheveil)
to Van Buskirk’s life, and links to other relevant projects,” the reality of locating the time and resources to maintain digital collections may be holding those ambitions in check.20

While some initiatives might be kept back by the realities of hiring content managers and website developers, the initial barrier for projects that make history available to anyone has to be the hosting library or archive’s readiness to open up their resources. The original Van Buskirk diaries are housed in the Special Collections of the University of Washington Libraries (and “available only on site or on microfilm via interlibrary loan,” as CUNY points out). Institutional goodwill and organization are needed to digitize more collections such as this one and set them up for online scholarship. Select libraries have actually made the gesture to render their holdings open under a Creative Commons license. A case in point is the Folger Shakespeare Library, whose collections have been a source of many a digital humanities project; CUNY Digital History, an open institutional archive now being used for the creation of an asynchronous historical game about the struggle for open admissions;21 and the John Carter Brown (JCB) Library, which has made its digital collection of pre-1825 Americas open access.

Elizabeth Heath and Julia Landweber, both historians of colonial France (Baruch College, CUNY and Montclair State University respectively) are two scholars who have relied on the JCB Library’s collection to plan their digital undertaking, Visualizing the Data of the Eighteenth-Century French Caribbean. The project, about the economic and political uses of France’s colonies in the Caribbean, relies on eighteenth-century French census records (released with permission) and digitized historical maps, openly provided by the library, which will be transformed into geo-referenced files. The library’s permissions will make it possible for the online resource to remain a renewable one in the future—for scholars to download the maps and instructors to use them in teaching, perhaps with the help of other open-source mapping tools.22 Heath and Landweber state on their website that they hope to build out the project with an “analytical armory,” adding critical essays, timelines, and suggestions for further research. The end result therefore seeks to be not a stable, archived reenactment of history, such as Edward Ayers’ The Valley of the Shadow23 or Janine Barchas’ What Jane Saw24—two classics of the digital history genre—but a dynamic work primed for iterations and collaborations.

Digital Tools for Research and Scholarship

Some of the greatest changes the open-source revolution has wrought in the way history is practiced on a day-to-day basis have taken place in the sphere of research and scholarship. In 2006, the Rosenzweig Center introduced Zotero, which helps collect, organize, and analyze gathered data. At its base, the tool is about capturing, managing, and citing sources — services that are becoming increasingly useful as more and more archives get digitized and available. The next year, the same team created Omeka, an open-source platform for the display of archival, museum, or research collections. And, in 2018, the Center responded to the decade-long practice of allowing photography in the archives by creating the open-source tool Tropy, which allows scholars to organize their digital photos, tag them individually or in bulk, search across the metadata, and export to other platforms. Tools created elsewhere to help historians analyze the data they collect include the open-source Tesseract, used for optical character recognition, and Recogito, an open geo-tagging and geo-referencing technology specifically designed to work with maps.25 With this assortment of new digital solutions, historical research can be greatly eased and streamlined, and the ever-present problem of PC data storage and retrieval—and potential data loss—kept at bay. A struggle that remains, however, is coming up with enough funding and institutional will to educate scholars in the use of these novel resources. The challenges of integrating technical training into graduate academic programs—as well as in faculty professional development—is one that has been

20 https://vanbuskirk.commons.gc.cuny.edu/
21 https://blogs.baruch.cuny.edu/cunygame/
22 https://blogs.baruch.cuny.edu/mappingthefrenchcaribbean/?page_id=31
23 https://valley.lib.virginia.edu/
24 http://www.whatjanesaw.org/
25 The author wishes to thank Dr. Dimitris Papadopoulos for providing helpful information about Tesseract and Recogito.
raised in the context of introducing new tools and technologies. Wider publicity for their advantages, on a departmental as well as an institutional level, would help instill new habits in the rising generation of scholars.

The appearance of digital tools that ease the historian’s work of management and organization can already be seen as a watershed moment in the profession. In this vein, John Mack Faragher’s decision to publish his 5,000 meticulously labeled research notes in a project entitled Digitizing Daniel Boone appears as an important gesture encouraging transparency about the way scholars conduct their work. The end result is a resource to be emulated and a practicum for any student entering the profession. Yet, a more important affordance than citation management of open-source technologies like Zotero, Recogito, and Tropy is their built-in ability to share information. Anything made with these tools can be emailed or transferred, via attachment, to a group library or a research team—as well as made completely public. In 2007, the digital “personal assistant” Zotero joined forces with the Internet Archive, the world’s greatest multimedia online library, to create a commons via which a scholar’s gathered materials could be stored permanently on the Archive.

These latest open-source creations challenge Rosenzweig’s own statement that “historical scholarship is characterized by possessive individualism,” followed by his estimate that only six percent of all recent articles have more than one author. Yet, when analyzing three recent introductory texts for the profession, James Herbert found that two of them still described the historian’s endeavor as basically solitary. One, James Cortada’s 2015 History Hunting: A Guide for Fellow Adventurers, pointed to how the digital revolution is transforming research technique and encouraged greater collaboration among scholars.

If Wikipedia, pointedly described by Rosenzweig as “a historical work without owners and with multiple, anonymous authors” has gained widespread acceptance, so could the collaborative practices of open-source tools for historical scholarship—as well as the usage of data in open repositories and the adaptation of open texts, where straightforward adoption might not satisfy the exigencies of the instructor. While these are lofty goals, the Time for Class COVID-19 survey states that 60 percent of instructors nationwide have reported integrating new digital tools in the classroom. While perhaps driven by necessity, this finding points to an unprecedented comfort with technology (if not specifically open-source matter).

The uptake of resources is, first and foremost, a matter of discovery, and concerted efforts by history departments working alongside college administrations, libraries, and teaching centers are necessary in this regard. While the existing libguides and research guides on history OERs are a step in the right direction, a more centralized effort by norm-setting organizations in the profession remains essential. The webpage recently published on the website of the American Historical Association, which lists digital (again, not specifically open) projects launched from 2015 to 2018, “Guidelines for the Professional Evaluation of Digital Scholarship” as well as “Resources for Getting Started in Digital History” should act as a stimulus for the field. Another initiative from the AHA is a still-to-come listing of digital archives. The website currently has an option for contributors to submit “their favorite primary-source archival collection,” with a listing of the geographical area. This crowdsourcing effort should reveal significant gaps in the field (digital history resources pertaining to the United States prevail) and, hopefully, a robust effort to rectify those gaps by the launching of new initiatives.

The current attention to undergraduates’ fiscal needs, combined with the need to diversify teaching material

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26 See, for example, Allison Marsh, Literary and Linguistic Computing 28, no. 2 (June 2013), 279–282.
27 https://sourcenotes.miamioh.edu/daniel-boone/ This resource is powered by SourceNotes, an online platform which helps researchers organize their notes from primary and secondary sources, developed by Andrew Offenberger at Miami University and Raphael Folsom at the University of Oklahoma.
32 https://www.historians.org/teaching-and-learning/digital-history-resources
during the Covid-19 pandemic may provide the greatest impulse to both the discovery and creation of accessible resources in history. A case in point is the Covid-19 Archive, *Journal of the Plague Year* (JOTPY), which has grown to include thousands of multimedia items and partnered with Brooklyn College and Bronx Community College. Students are encouraged to contribute their personal accounts in a multitude of formats and reach out to others in the larger archive, both domestically and internationally. This instance of “rapid response archiving,” started at Arizona State University and hosted with Omeka-S software, has given many learners a much-needed outlet and a chance to memorialize their experience of the pandemic. 34

Historian Mark Tebeau describes JOTPY as an exercise in collective digital archiving, following in the footsteps of the September 11 Digital Archive and the Hurricane Digital Memory Bank, that rectifies lacunae in traditional collections, such as the experiences of the young and the very old. 35 Such an act of community-gathering goes to the heart of what open historical resources can be. Another instance of digital history-making now hosted on the Internet Archive is a collaborative exchange by the students of Brooklyn College-CUNY and members of a radio station in Sinazongwe, Zambia entitled *Building Radio Bridges-Audio Letters between Lockdown New York and the Zambezi Valley*. This mixed-content podcast commemorated the experiences of Spring 2020 and connected far-flung communities. 36 We may see more such projects that enable students to document their lived experience from wherever they are and serve as touchstones for sophisticated discussions in both traditional and virtual classrooms.

**Conclusion**

As the acceptance of digital solutions becomes increasingly common, the flexibility, creativity, and community-building impetus of open-source materials and tools set them apart from traditional options. The vision behind the OER Commons, the Internet Archive, Wikipedia, and the Rosenzweig Center is gradually becoming a reality. At the same time, those who use and enjoy OERs need to keep in mind that while “information wants to be free,” as per Stewart Brand’s iconic phrase, the true meaning is “free of restrictions” rather than “free of cost.” Open educational resources are a public good—a status justified by their inclusion and equity aspects. They require public investment to pay the creators, keep the standards up to date, respond to the interests and needs of various communities, and ensure proper preservation. One workable model could be for creators to receive generous stipends for seed content. Institutions can then maintain, improve on, and iterate this content with the help of contributions that are crowdsourced or made part of instructional content by several departments.

Subject librarians may help introduce relevant collections to history classes by leading instructional sessions on what students can glean from a primary source such as the Philip Van Buskirk Archive or JOTPY. Some library and IT resources can also be diverted to partnering with instructors in creating relevant modules, from a short capsule session around a single item in the National Archives to a Pressbook devoted to an in-depth examination of a historical work. 37 Meanwhile, teaching centers can work with history departments on ways to assess student engagement with online resources, developing some guidelines around low- and high-stakes assignments aligned with classroom learning goals.

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36 [https://archive.org/details/BuildingRadioBridges_2020](https://archive.org/details/BuildingRadioBridges_2020). Another example of history-in-the-making as crowdsourced pedagogy is The Sociology of Hip Hop class at Brooklyn College [https://sochiphop.commons.gc.cuny.edu/](https://sochiphop.commons.gc.cuny.edu/), which expects its students to “demonstrate knowledge of hip-hop history and its evolution” and “discuss the relationship between the social, economic, and political as they exist in hip hop and our society at large.”

37 One example is a Pressbook created by Librarian Angela Weaver in partnership with her colleagues, an IT student and a subject scholar, Olympe de Gouges, *La France sauvée, ou le tyran détrôné: A Dramaturgical Casebook* [https://uw.pressbooks.pub/lafrancesauvee/](https://uw.pressbooks.pub/lafrancesauvee/).
SPARC’s Open Pilot Textbook Program, currently up for renewal in Congress, constitutes the most promising federal grant initiative to date; on the state level, funding for the City University of New York and the State University of New York, now in its fifth year, has provided a powerful impetus for resource development and innovation. Getting educators and students to use and create OER could be the key to further growth and innovation. Involving more organizations nationwide, such as public broadcast services, K-12 educational programs, and national museums, would be beneficial. For instance, themed exhibits could feature relevant digital history projects while soliciting derivative works based on public-domain sources or links to related content. Instructors might assign a presentation or analysis based on an online resource, then engage the creators of websites to link out to student work that illuminates or builds on their content. WordPress-based open publishing platforms, as well as open presentation-making tools such as Timeline JS and StoryMap JS from Northwestern University’s Knight Lab, make individual engagement with knowledge easy to package and publish.

Having students themselves participate in and author content that speaks to their own experience of historical events could also add to a growing field that seeks to legitimize individual voices and diversify class content—a potentially small-scale first encounter with OER. Some history instructors have already begun to experiment with such open pedagogical formats. Examples at the author’s own institution range from a StoryMap of a composer's hometown to a crowdsourced vision of contemporary political engagement. While such exercises may not fit with all teaching approaches, other options for expanding one's pedagogy to include a greater assortment of voices abound. A journey through open resources in history may start with a class session annotating a letter from a bygone era and comparing its message to a blog post from a “rapid archive”—or authoring such a post. Other instructors may begin elsewhere by assigning an open text that seeks to expand the geographic and historiographic scope of their field and accompany it with an interactive resource.

At the time of writing, the AHA has expanded its engagement with online learning with its inaugural, well-attended digital history workshop (Spring 2021), new free-to-access textbooks are being authored, and teaching and research tools tried out in specialized webinars. The profession’s engagement with open resources, which dates back to Michael Hart’s efforts half a century ago, is only beginning.

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39 For a description of Knight Lab’s storytelling projects, see https://knightlab.northwestern.edu/