

Adaptation Guide

Adaptation Guide

A reference to adapting or revising an open textbook

Lauri M. Aesoph



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This guide is a remix of original material, text from the BCcampus Open Education *Authoring Guide* by Amanda Coolidge and Lauri Aesoph, and text from *6 Steps to Adapting an Open Textbook* by Clint Lalonde.

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This guide can be referenced. In APA style, it should appear as follows:

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About this Guide

This is one of many support guides from BCcampus Open Education. It is designed to supplement our main resource: the [Self-Publishing Guide \[New Tab\]](#)

Individuals using this guide, might also find the BCcampus Open Education [Pressbooks Guide \[New Tab\]](#) useful.

Welcome to the BCcampus Open Education *Adaptation Guide*. This support resource covers how to customize — or adapt — an open textbook so that it better fits your needs in the classroom and elsewhere. The guide defines the term *adaptation* and discusses reasons for revising a book, why this is possible with an open textbook, and the challenges involved.

BCcampus Open Education began in 2012 as the B.C. Open Textbook Project with the goal of making post-secondary education in British Columbia more accessible by reducing students' costs through the use of open textbooks and other OER. BCcampus supports the post-secondary institutions of British Columbia as they adapt and evolve their teaching and learning practices to enable powerful learning opportunities for the students of B.C. BCcampus Open Education is funded by the [British Columbia Ministry of Advanced Education, Skills & Training](#), and the [Hewlett Foundation](#).

Open educational resources (OER) are defined as teaching, learning, and research resources that, through permissions granted by the copyright holder, allow others to use, distribute, keep, or make changes to them. We consider this publication — along with our guides, webinar slide decks, and other support materials — as a type of OER that trains faculty, staff, and students how to build, customize, and use open textbooks.

This guide does not come with an index. Instead, use the search field located in the top-right of each page in the online version to locate a specific topic.

The [BCcampus Writing Guidelines for Style and Tone \[New Tab\]](#) and [BCcampus Open Education Style Guide \[New Tab\]](#), along with the attached style sheet [Word file] – to be added – were referenced during the copy editing and proofreading phases of this guide.

If you find an error in this toolkit, please report it using the [Report a Textbook Error](#) form. For other

feedback or comments, fill out the [BCcampus contact form](#).

Introduction

This *Adaptation Guide* provides much needed information on the why, what, and how of making changes to an openly licensed textbook and other open educational resources (OER). In other words, it addresses the “revise” and “remix” members of [David Wiley’s “5 R’s of openness” club](#).

In addition to the cost to students, one of the biggest advantages of choosing an open textbook is it gives faculty the legal right to add to, adapt, or delete the content of the textbook to fit their specific course without obtaining permission from the copyright holder. This is possible because the copyright holder has already granted permission by releasing their work using an open — or [Creative Commons](#) — license. This type of licence gives users permission to use and reuse, share, copy, retain and modify the textbook without consulting the author.

The term, **adaptation**, is commonly used to describe the process of making changes to an existing work. Though we can also replace “adapt” with revise, modify, alter, customize, or other synonym that describes the act of making a change.

What is an Adaptation

Definition of "Adapt"

The term, adaptation, is commonly used to describe the process of making changes to an existing work. Though we can also replace “adapt” with revise, modify, alter, customize, or other synonym that describes the act of making a change.

In addition to cost to students, one of the biggest advantages of choosing an open textbook is it gives faculty the legal right to add to, adapt, or delete the content of the textbook to fit their specific course without obtaining permission from the copyright holder. This is possible because the copyright holder has already granted permission by releasing their work using an open — or Creative Commons — license. This type of license gives users permission to use and reuse, share, copy, retain and modify the textbook without consulting the author.

Why Adapt an Open Textbook

Reasons to Adapt an Open Textbook

One of the benefits of using an openly licensed textbook or other educational resource is that you are free to adapt it to fit your needs. In other words, you can adjust the educational resources to fit your course curriculum, not the other way around. Other reasons for revising an existing open work might be to:

1. Address a particular teaching style or learning style
2. Adjust for a different grade or course level
3. Adapt for a different discipline
4. Accommodate a different learning environment
5. Address diversity needs
6. Meet a cultural preference
7. Meet a regional or national preference
8. Address a school, district, or institution's standardized curriculum
9. Make the material more accessible for people with disabilities
10. Add material contributed by students or material suggested by students
11. Translate the material into another language
12. Correct errors or inaccuracies
13. Update the book with current information
14. Add more media or links to other resources
15. Use only a portion of the book for a course¹

1. Some of this material is based on: WikiEducator. "Adapt" in OER Handbook for Educators (http://wikieducator.org/OER_Handbook/educator_version_one/Adapt) and [Why Remix Open Educational Resources?](#) created by Liam Green-Hughes, both used under a [CC-BY](#) license

Permission to Adapt

When it comes to working with open textbooks (and open educational resources in general), one of the conceptual hurdles faced by most people is around the notion of adapting or changing someone's work. What exactly can be adapted within the scope of an open textbook, and won't the original author get upset if you change their work?

Changing someone's work can feel uncomfortable. But rest assured, if the author has released their textbook under a Creative Commons license that allows for adaptation (which is any Creative Commons license that does not have a **No Derivative (ND)** attribute added to it) then they expect that you will change the content, providing you give them the proper **attribution** (and we'll get into this). *Using information and media from an open textbook or other open educational resource are NOT considered plagiarism.*

But what can you change?

Anything and everything in an open textbook can be changed as long as the conditions of the open license are met. The modifications or changes you make can be fairly minor or major depending on what you need to do to make the book work for you. That is the beauty and power of open textbooks. You are in charge of the resource. You have been given permission to change it ahead of time by the original author. Take advantage of it. They want you to.

Why you should use openly licensed materials

If you are looking for content to add to your textbook, you should look for and use [Creative Commons](#) licensed material. While you can use material that has not been released under a Creative Commons license, it does limit how others can use or reuse that material. As well, you must first obtain written permission from the copyright holder to use copyrighted material in the textbook and clearly note in the textbook the specific material that is copyrighted. This is to ensure others using the book in the future know they cannot reuse that material.

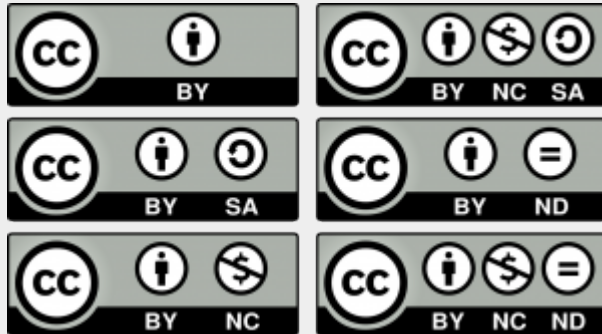
Don't forget the public domain

Once the copyright of a work has expired, has been forfeited, or is inapplicable, it is part of the [public domain](#) meaning that permission is not required to use it or make changes to it. [Creative Commons provides public domain](#)

[tools](#) that enable authors and copyright owners who want to dedicate their works to the worldwide public domain to do so, and facilitates the labeling and discovery of works that are already free of known copyright restrictions.

Note:

Using copyright material released with a restrictive license is a barrier to future reuse and limits the usage of the resource in the future. Therefore, we recommend using [Creative Commons](#) licensed material that can legally be shared and reused.



See [Choose a License](#).

Three Steps Before You Begin

A good rule of thumb when creating an adapted textbook is to keep it simple, especially if you are approaching a remix project for the first time. While it may be tempting to make a number of major changes to a textbook before releasing it to your students, think of the textbook as a living resource that you can improve incrementally over time.

Here are three steps to consider before adapting an existing textbook.

Step 1: Check the license

First, check the license to make sure you have the permission to modify the contents. As long as the Creative Commons license does not have a [No Derivative \(ND\)](#) attribute, you are able to change the contents of the book. See [Creative Commons](#) for more information on licenses.

Step 2: Check the file format

If you want to adapt an open textbook, you will need it in a workable technical format, i.e. an editable file type. These include:

- Pressbooks or WordPress files (.xml or .wxr)
- HTML files (webpages)
- Word document (.docx) or OpenDocument Text (.odt)
- Simple text files (.txt)
- EPUB (see “[Export Google Docs as ePub Files](#)“)
- LaTeX files (if the original book includes math or science formulas and equations)

Avoid PDF documents

Many open textbooks are only available as a PDF document, which are not editable. If you want to adapt an open textbook that is only available in PDF format, you will need to convert the PDF document to one of the editable formats listed above.

Converting a PDF document to an editable format is a difficult, time consuming, and imprecise process. Before taking the time to do this, consider contacting the author and asking for a copy of the textbook's source files.

Step 3: Use editing tools

Once you have an editable file, you are ready to begin your adaptation. The tools you use to create your adaptation will depend on the source file of the original textbook and how comfortable you feel working with the format and tool.

Pressbooks

A commonly used publishing and editing tool is the online publishing and editing software called **Pressbooks**. This web-based tool is based on the popular WordPress authoring platform. Working in Pressbooks is similar to working in a Learning Management System (LMS) such as [Moodle](#) or [BrightSpace by D2L](#).

You can import a number of different formats into Pressbooks for editing including Word, EPUB, and HTML. In turn, from Pressbooks a number of source files can be exported such as EPUB (for use in most e-readers), MOBI (for Kindles), PDF (for printing), HTML, ODT, and XML to act as back-up files for Pressbooks and WordPress.

For more information, see [Pressbooks: Online Software to Make Adaptation Easier](#) in the appendix or the [Pressbooks Guide](#) (open creation).

Consider Starting Small

An adaptation can turn ugly, like a house renovation project gone mad taking twice the time and three times the energy than you thought.

To prevent from falling into this trap, consider starting small. For your first crack at an adaptation, decide to make a few minor changes such as:

- Removing the chapters you don't need OR
- Adding an example or two from your current curriculum OR
- Including some exercises you've found useful in the classroom.

Start small. But think big.

While you are taking these baby steps, think of the huge pedagogical potential hidden away in an open textbook. Plan and dream and scheme about what *could* be done with this book; a book in which the author has give you permission to use, share, and change content to your heart's content and the only payment is to give her or him credit.

What a gift!

So, start small and don't let this gift become a demanding, uncontrollable beast that consumes you. Start small, give it a few treats, and get to know each other. Then, when you're bursting at the seams with ideas and enthusiasm, write down all of the wonderful things you want to change, when both you and the textbook are ready, on your "Adaptation Bucket List".



Memo by KCADRC in the public domain.

How to Adapt an Open Textbook

Is this Open Textbook in Production?

There are many open textbooks, both new creations and adaptations, currently in production and once finished will be available to the open education community. Before you consider adapting an existing open textbooks, review the following lists for open textbook projects currently in progress.

Project	List of Open Textbooks in Progress
BCcampus	Projects – IN PROGRESS
eCampus Ontario	Open Content Funding
Open SUNY	Forthcoming open textbooks
Rebus Community	Active Open Textbook Projects

Find an Open Textbook

Typically, most instructors begin their quest for an open textbook by searching the many established open textbook and OER collections available which are listed below.

BC Open Textbooks	
College Open Textbooks	HippoCampus
Merlot II	MIT Open Courseware Online Textbooks
National Science Digital Library (NSDL)	NOBA Project Textbooks
North Carolina Learning Object Repository (NCLOR)	OER Commons
OpenStax	Open SUNY Textbooks
Open Textbook Library	Project Gutenberg
PhET: Interactive Simulations For Science and Math	Saylor Academy Open Textbooks
Skills Commons Open Textbooks	SOL*R
UC Davis ChemWiki	Wikibooks

Other ways to find open textbooks or other OER include:

1. Connect with your library
2. Ask your colleagues what OER they use
3. Conduct an advanced Google search: https://www.google.ca/advanced_search
4. Get your students to find open resources, have them do a content review, and post the results to your course website or Learning Management System (LMS)

Evaluating an open educational resource collection

To help you assess the collections or repositories you are searching, refer to [Open Education Resource Repository \(OERR\) Rubric](#), developed by the the [BCOER Librarians](#) Working Group. This document is listed below.



Open Education Resource Repository (OERR) Rubric

Developed by the BCOER Librarians Working Group

The Open Education Resource Repository (OERR) rubric was developed by the BCOER Group to provide a process of evaluating open education resource repositories. There are numerous sources of open education materials available; however, understanding which spaces to begin searching for these materials can be daunting. The rubric was developed to evaluate open education resources repositories (OERR) in the following areas:

- Authority
- Audience
- Access & Diversity
- User-friendliness
- Subject Coverage
- Search Functionality & Browsing
- Media Type
- Licensing & Permissions

The rubric sets out a definition for each area and an evaluation based on a leveled system (e.g. Level 3 – highest rating.)

Definition of Open Education Resource Repository

For the purpose of this rubric, an open education repository is defined as:

An online storage system that allows educators to share, manage and use education resources. The repository contains a collection of learning items that support instruction. These items include:

- open textbooks
- lesson plans
- quizzes (e.g. iclickers, etc.)
- videos, animations, handouts
- interactive activities and tools (e.g. apps)
- powerpoint presentations

For the purpose of this project, we will be excluding the following from the OER definition:

- MOOCs lists and full courses
- Open access publications, including: journals, reports, etc.
- Paid resources



February, 2015



- Government websites

Authority

This rubric focuses on the credentials, reputation and association the author/institution has to the subject matter covered in the OERR.

Level 3 - An OERR has a rating of level 3 for authority when the following are true:

- The OERR content is peer reviewed by individuals with credentials in the field. For example, a faculty member in biology reviews OE content uploaded to the repository.
- The OERR is affiliated to institutions of higher education. Example: Harvard University

Level 2 - An OERR has a rating of level 2 for authority when the following are true:

- The OERR content is reviewed by experienced individuals in the field. For example, an editor of biology magazine reviews OE content uploaded into the repository.
- The OERR is affiliated to agencies providing educational services. Example: Pathways Educational Services

Level 1 - An OERR has a rating of level 1 for authority when the following are true:

- The OERR content has no visible review standards for content curated.
- The OERR has no visible affiliations to institutions or organizations of merit.

Audience

This rubric focuses on the collection of people, based on age, experience or expertise for which the content was developed or curated.

Level 3 - An OERR has a rating of level 3 for audience when the following are true:

- The OERR content is organized and accessible by audience type. Example: The OER allows for both browsing and limiting by undergraduate.
- The OERR content is comprised mainly of materials developed for scholars in higher education.

Level 2 - An OERR has a rating of level 2 for audience when the following are true:

- The OERR content is organized by audience but accessibility is limited. Example: The OER allows for browsing of undergraduate materials but the search cannot be limited by audience.
- The OERR content is comprised of materials developed for all education levels.

Level 1 - An OERR has a rating of level 1 for audience when the following are true:

- The OERR content has no visible organization based on audience type.
- The OERR content has minimal materials developed for scholars in higher education.

Access & Diversity

This rubric focuses on the availability and the provision of content for variety of learning styles and capabilities.

Level 3 - An OERR has a rating of level 3 for access and diversity when the following are true:

- The OERR requires alternative formats for uploaded materials. Example: A video includes the written transcript.
- The OERR contains a diversity of gender, language, cultural expression, and educational approach. Example: A Spanish instructor records a video lecture on Carlos Ruiz Zafón.





Level 2 - An OERR has a rating of level 2 for access and diversity when the following are true:

- The OERR has some resources with alternative formats.
- The OERR has very little content containing a diversity of gender, language, cultural expression, and educational approach.

Level 1 - An OERR has a rating of level 1 for access and diversity when the following are true:

- The OERR has no statement of inclusion of alternative formats.
- The OERR does not contain diversity of gender, language, cultural expression, and educational approach.

User-friendliness

This rubric focuses on the barriers to accessing and using the OER content.

Level 3 - An OERR has a rating of level 3 for accessibility when the following are true:

- The OERR does not require any registration for access to content.
- The OERR is functional across all operating systems and a variety of web browsers.
- The OERR does not require fee for use.
- The OERR navigation is intuitive to use.

Level 2 - An OERR has a rating of level 2 for accessibility when the following are true:

- The OERR requires registration for access to some content.
- The OERR contains some material that is limited to an operating system or web browser.
- The OERR contains some material that requires payment for access to content.
- The OERR navigation requires some trial and error to use.

Level 1 - An OERR has a rating of level 1 for accessibility when the following are true:

- The OERR requires registration for accessing content.
- The OERR is limited to a specific operating system or web browser.
- The OERR requires payment for access to content.
- The OERR navigation is counterintuitive and/or requires additional guidance.

Subject Coverage

This rubric focuses on the depth of coverage of a subject area.

Level 3 - An OERR has a rating of level 3 for subject coverage when the following are true:

- The OERR contains comprehensive materials within a subject area. Example: The OER contains subject materials in the area of continental philosophy and includes coverage of existentialism, idealism, and post-structuralism.
- The OERR connects important associated concepts within the subject matter. Example: A search on continental philosophy will yield existentialism, idealism, and post-structuralism in the search results.

Level 2 - An OERR has a rating of level 2 for subject coverage when the following are true:

- The OERR contains some comprehensive materials in some subject areas. Example: The OER contains comprehensive content for cellular biology but minimal content in the area of molecular biology.



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- The OERR connects important associated concepts within some subject matters. Example: The OERR contains important association concepts within cellular biology materials but not in molecular biology.

Level 1 - An OERR has a rating of level 1 for subject coverage when the following are true:

- The OERR does not contain comprehensive materials within any subject.
- The OERR does not connect important associated concepts within the subject matter.

Search Functionality & Browsing

This rubric focuses on the search functionality (e.g. advanced, basic, truncation, etc.) of the OERR to help users find exactly what they need without having to spend too much time browsing.

Level 3 - An OERR has a rating of level 3 for search functionality & browsing when the following are true:

- The OERR contains an advanced search function with limiters for audience, subject, media type, and licensing and permissions.
- The OERR provides browsing functionality for audience, subject, media type, and licensing and permissions.
- The OERR search and browsing results yield relevant results.

Level 2 - An OERR has a rating of level 2 for search functionality & browsing when the following are true:

- The OERR has an advanced search function and includes some or no optional limiters.
- The OERR provides limited browsing functionality. Example: The OER allows browsing by audience, but not by media type.
- The OERR search and browsing yield some relevant results.

Level 1 - An OERR has a rating of level 1 for search functionality & browsing when the following are true:

- The OERR does not have an advanced search function, but may have a basic search function.
- The OERR does not have a categorized browsing functionality.
- The OERR search and browsing yield irrelevant results.

Media Type

This rubric focuses on the types of media (e.g. video, audio, textual, visual, etc.) found within the OERR.

Level 3 - An OERR has a rating of level 3 for media type when the following are true:

- The OERR contains a wide variety of media types.

Level 2 - An OER has a rating of level 2 for media type when the following are true:

- The OERR has some variety of media types.

Level 1 - An OERR has a rating of level 1 for media type when the following are true:

- The OERR contains a small variety of media types.

Licensing and Permission

Level 3 - An OERR has a rating of level 3 for licensing and permission when the following are true:

- The OERR is free to share, alter, and adapt, subject to some restrictions (e.g., CC-BY-SA or CC-BY-NC)





- The OERR is covered by a robust and easy-to-understand licence (e.g., Creative Commons or GNU)

Level 2 - An OERR has a rating of level 2 for licensing and permission when the following are true:

- The OERR is free to share, but *not* to alter or adapt (e.g., CC-BY-ND or CC-BY-NC-ND)
- The OERR is covered by a robust and easy-to-understand licence (e.g., Creative Commons or GNU)

Level 1 - An OERR has a rating of level 1 for licensing and permission when the following are true:

- The OERR is free to share for educational purposes *only* (i.e., not free to share for other non-commercial purposes)
- The OERR is *not* free to alter or adapt
- The OERR is covered by vague or non-specific terms of use (e.g., website terms of service)

Evaluate an Open Textbook

The [BCOER Librarians](#) have developed a useful guide to assist faculty with the open textbook and OER evaluation process. This [Faculty Guide for Evaluating Open Education Resources](#) has been released under a [CC-BY 4.0 International](#) license. Feel free to print as many copies as you need for evaluating open textbooks.

Faculty Guide for Evaluating Open Education Resources

With so many freely available resources online, choosing OER can be overwhelming. This checklist contains some suggestions for faculty when choosing resources for use in the classroom.

RELEVANCE

- Does the information directly address one or more of the class objectives?

ACCURACY

- Is the information accurate? Are there major content errors or omissions?
- Are there spelling errors or typos?
- Has the material been peer reviewed?

PRODUCTION QUALITY

- Is the information clear and understandable?
- Is the layout and interface easy to navigate?
- Do the design features enhance learning?
- For multimedia resources, are the audio/video quality high?

ACCESSIBILITY

- Is the resource available in alternative formats (e.g. .doc or .odf)?
- For audio or video resources, is there a transcript or subtitles?

INTERACTIVITY

- Does the resource encourage active learning and class participation? If not, are you able to add that to the resource?
- Are there opportunities for students to test their understanding of the material (e.g. a video with embedded questions)?

LICENSING

- Does the license allow for educational reuse of the materials?
- Does the license allow modifications or adaptations of the materials? If so, can you modify the resource to better fit the class objectives or encourage active learning?

FURTHER INFORMATION

JISC. (n.d.). *Open Educational Resources infoKit* [wiki]. Retrieved from <http://bit.ly/oerinfokit>.

MERLOT. (n.d.). MERLOT Faculty Development Portal: EVALUATION CRITERIA. Retrieved from <http://facultydevelopment.merlot.org/ReviewCriteria.html>.

Shank, J. D. (2014). *Interactive open educational resources: A guide to finding, choosing, and using what's out there to transform college teaching*. San Francisco: Jossey-Bass.



This guide is a creation of the BCOER, a group of BC postsecondary librarians working together to support the use of quality Open Educational Resources (OER). For more information about BCOER and its activities, go to



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Make a Plan

Before adapting an existing book, it's important to establish a road map that will guide the timeline of the work, layout and style of the work, and [desired changes](#). Whether your adaptation is small or large, this step is important to ensure a cohesive and consistent final product. Below are tips to help you with style and consistency.

Style

To help you set this up, see the [Style Guide \[New Tab\]](#) in the BCcampus Open Education [Self-Publishing Guide \[New Tab\]](#). Consider creating a **style sheet** as well that identifies the idiosyncrasies of your adaptation in terms of style, such as citation, spellings, and layout. For an adaptation, it is suggested that you follow the citation style used by the original author to maintain consistency throughout the open textbook.

Consistency

One of the challenges of adapting an open textbook is to create a final product that is consistent throughout. It is highly recommended that you assess the original textbook before you begin. Once this has been done, attempt to match all revised and new text, resources, layout and citation styles to that of the original work.

Assess language and tone

Begin by assessing the style and tone of the original text. Here are some elements to be aware of:

- Is the tone of the language formal, or friendly and conversational?
- How does the author address the reader? From a distance? Or does the author include the reader with phrases such as “we learn” and “you will see”?
- How is punctuation used? For example, are serial commas used, i.e. a comma before “and” when listing three or more things: “the cat, the dog, and the horse” OR “the cat, the dog and the horse”.
- How long is the typical sentence? Paragraph?
- Pay attention to the word count for existing chapters (average and range). Try to maintain this count for both new and revised chapters. Ask your project manager for assistance, if required.

What is the layout?

As you review the textbook, take note of the following:

- Does each chapter contain specific pedagogical features such as Learning Objectives, Exercises, Summary, Suggested Readings, highlighted points of interest?
- Does the author use lists? If so, are bullets or numbers used or something else?
- How are headings used? Are sub-headings used? What is the highest heading level used?
- How long are sections under a heading or sub-heading?

How are resources used?

Resources refer to all items other than text, such as photos, graphs, diagrams and multimedia content (video or audio links). Pay attention to what types of resources the original author used, how often they are inserted and how they are labeled. Ensure all external resources are either released with an open copyright license or are in the public domain. See [Fair Dealing and Fair Use \[New Tab\]](#) in the [Self-Publishing Guide \[New Tab\]](#).

- Resources should have a caption (e.g., Figure 1 + description). See the [Resources: Captions and Attributions \[New Tab\]](#) section in the [Self-Publishing Guide \[New Tab\]](#) for details.
- Differentiate between figures and tables (e.g., Figure 1.2 or Table 1.2).
- For adaptations, use the numbering system employed by the original author.
- For new creations, use a numbering system that incorporates the chapter number and image sequence. For example, for the first figure in Chapter 1 caption the figure, Figure 1.1.
- New types of resources can be added to the adapted version however, keep the overall textbook in mind. When adding a new type of resource ensure that it enhances the flow of the book.
- In addition to the above, we suggest the attribution be based on the [guidelines recommended by Creative Commons \[New Tab\]](#).

References and citation style

When you assess the textbook, identify both the citation style, and how and where references are listed in the book (e.g., at the end of each chapter, at the end of the book, or as footnotes). Note how in-text citations are used including punctuation. Consider using the same citation style.

What Are the Changes

What will you change?

Adapting or changing an existing open textbook doesn't need to be onerous. The changes you make can be simple such as:

- Changing the title of the book, some or all of its chapters or chapter sections
- Adding one or two new images
- Removing a chapter that isn't pertinent to your course
- Removing a chapter to be used, leaving the rest of the book behind

Sometimes, an adaptation might require more than a few simple changes. For example:

- A significant number of chapters might be removed, leaving behind just the ones that fit the course curriculum.
- Chapters might be reordered to more accurately fit the order in which material is presented in a course.

It might be necessary to add material from other open textbooks or open educational resources to the open textbook you are adapting. For more information on where to find openly licensed images and other content, see [Resources: Search and Find \[New Tab\]](#) in the BCcampus Open Education *Self-Publishing Guide* [\[New Tab\]](#). Also take a look at [Resources: Only the Open \[New Tab\]](#).

Maybe you decide to write new material to fill in the gaps of an existing textbook such as new examples or exercises. (If you do this and plan to release the finished work as an open textbook, remember that your new work will be included under this license.)

Will it be difficult?

How easy or difficult this will be depends on a number of factors, including;

- How much content do you wish to change? Do you want to remove chapters, or rewrite entire chapters of content?

- What technical format is the original textbook in? A Word document is much easier to modify than a PDF document.
- What type of license is the content released under? Does it have a Creative Commons license that allows for modification or adaptation of the content?
- How comfortable are you with using technology and creating content?

Keep a record of all changes and additions

As the author, you retain copyright of all new material you create. This means that even if the new material you create is released under an open license, as the author, you will receive attribution for your contribution.

As you edit and make changes (text and images) and/or add new material, such as a chapter or section within a chapter, keep a list so these additions/changes:

- Can be included as part of the **Copyright Notice**
- Can be accurately attributed to you, the author

Minor changes, such as fixing grammatical or spelling mistakes, don't need to be documented.

If you add material from another openly licensed work to your adaptation, especially text, record the source and where it is used in your adapted version. This information is needed for the wording and placement of each **attribution statement** required for each open [CC BY \(Creative Commons Attribution\) \[New Tab\]](#) licensed work you use. For more information, see [Attribution Statements](#).

Changing images: add new ones or remove old ones

With an openly licensed resource, you are welcome to remove images that don't fit your needs or you can add new ones. You are also permitted to edit existing images. (Check the license of the image you plan to change to ensure that its permissions fit your intended change.)

For more information on:

- How to add or edit an image in Pressbooks, see [How to Add and Edit Images \[New Tab\]](#) in our [Pressbooks Guide \[New Tab\]](#)
- How to caption and attribute openly-licensed images, see [Resources: Captions and Attributions \[New Tab\]](#) in the [Self-Publishing Guide \[New Tab\]](#)
- Where to find openly licensed images and other content, see [Resources: Search and Find \[New Tab\]](#) in the [Self-Publishing Guide \[New Tab\]](#)

Consider using a copy editor and subject-matter expert

Even the best author benefits from the keen eyes of a copy editor. This individual looks at your work with fresh eyes and can provide feedback on grammar, spelling, readability, clarity, and consistency.

A subject matter expert (SME) — presumably a colleague or other individual who is an expert on the topic you're writing about — can provide suggestions about the content. It is best that the SME reviews your work before the copy editor.

One final step is to have a copy editor (preferably different than the one who copy edits your work) proof read the final draft.

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As far as how and where to place attribution statements for text or media taken from another source or sources, best practices state that you should place them at the bottom of each affected web page. Clearly mark all of these with a heading called: "Attributions". Several attribution statements can be listed under this heading. Here are examples.

Example of an attribution statement for adapted text

This chapter is an adaptation of [Natural Disasters and Human Impacts](#) (on [Open Geography Education](#)) by R. Adam Dastrup and Maura Hahnenberger, and is used under a [CC-BY-SA 4.0 International](#) license.

Note:

- The statement is clear, simple, and contains all elements required for a complete attribution: title of the work used, author(s), and license type. A link is provided to the original work, the home page of the website (this is optional), and the license type.
- There is no need to name the adapting author in this statement. This information should either be included on the **Book Info** page as a main author OR if you want to indicate which author wrote/ adapted which chapter, you can use the **Chapter Author** option at the bottom of each chapter/web page in Pressbooks.
- If the book is to be CC-BY licensed, then you will need to address the conditions dictated by the license for each resource you are using in your adaptation. At the bottom of the **Chapter** page in Pressbooks, there is an option to set the license type for that page which will override, for this page only, the overarching license chosen for the book on the Book Info page.
- If the chapter contains some original material AND some material from another source, then rather

than saying “This chapter is an adaptation of...”, say “This chapter contains material taken from...”.

Example of an attribution statement for an adapted image

Figure 1.2

[Dog](#) by [David Locke](#) is used under a [CC-BY 2.0 license](#). Modifications to this photo include cropping.

Note:

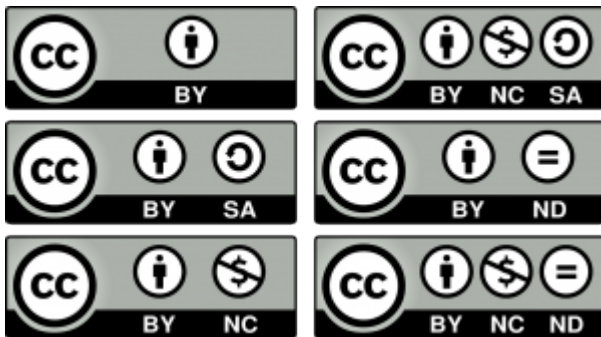
- The statement is clear, simple and contains all elements required for a complete attribution: title of the image, photographer, and license type, as well as a note of the changes made. A link is provided to the original work, the home page of the photographer (if available), and the license type.

Final Steps

Choose a License

If you are adapting an existing open textbook, the adaptations you make will be released with whatever open license you choose, while the rest of the book will be released under the license of the original book. In other words, you need to respect the license of the original work. You cannot license what you do not create. You can only attach a [CC-BY \(Creative Commons Attribution\)](#), or other open license to the parts of the book that you have created and are new.

However, there is a caveat. If the textbook you are adapting has a **Share-Alike** condition (e.g., [CC-BY-SA 4.0](#)) stipulated, then you must release the entire book using the same license as the original book.



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If you are using [Pressbooks](#) to create an adaptation, the license type chosen for the adapted portions of your open textbook and the license used for the original book, should be noted in a couple of places in the book, along with the changes made. You should also indicate who holds the copyright to specific parts of the book. For our purposes here, we'll refer to this as the **adaptation statement**. This statement should be noted as follows:

1. In the **preface** or other **front matter** page of the book there should be a clear statement that this book is an adaptation of an original open textbook.
2. There should also be a list of what changes were made or what new material was added to the original version in the Copyright Notice field (found on the Book Info page) so readers know which parts are newly created or changed, and which are from the original source.

If you are creating an adaptation using another system, such as Word, then displaying the adaptation and licensing information in the preface or other front matter page of the book should be sufficient.

Keep in mind that the reader could be viewing a printed copy with page numbers or an electronic version with no page numbers, so do not use page numbers as references. Instead, use chapters and chapter sections as reference points within the book.

Here is an example of an adaptation statement used on an *About the Book* page in the front matter of an adapted open textbook created in Pressbooks.

Introductory Business Statistics with Interactive Spreadsheets – 1st Canadian Edition was adapted by Mohammad Mahbobi from Thomas K. Tiemann’s textbook, *Introductory Business Statistics*. For information about what was changed in this adaptation, refer to the Copyright statement at the bottom of the home page.

The following is an example of the **copyright statement**. In Pressbooks, this information is added to the Copyright Notice field on the Book Info page. For an adaptation created using another system, such as Word, this information can be added to the preface or other front matter page of the book.

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- The license under which the book, as a whole, is released. The license type is hyperlinked to a page on the [Creative Commons website](#) that explains this license.
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All examples have been changed to Canadian references, and information throughout the book, as applicable, has been revised to reflect Canadian content. One or more interactive Excel spreadsheets have been added to each of the eight chapters in this textbook as instructional tools.

The following additions have been made to these chapters:

Chapter 4

- chi-square test and categorical variables
- null and alternative hypotheses for test of independence

Chapter 8

- simple linear regression model
- least squares method
- coefficient of determination
- confidence interval for the average of the dependent variable
- prediction interval for a specific value of the dependent variable

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Publish and Distribute

Once you've completed your adaptation, you will need to decide who to share your work with — your students, your colleagues, the bookstore and library at your institution, the open community — and how to do this. Also, what file types will you provide, what ancillary resources will you/could you include, and how will you ensure longevity for your work.

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- PowerPoint slides
- Test bank questions and answers
- Images
- Videos
- Student exercises

The future of your adaptation

Now that you've completed your adapted open textbook — whether the changes were minor or major — here are some questions you might ask yourself:

- How will I track who's using my book?
- How am I going to keep my textbook current?
- Do I want feedback on my work? How will I collect this?

Challenges

Adapting authors often ask our project about issues not covered in this Adaptation Guide. In an effort to share these challenges and their solutions, please read on.

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Some times, authors receive permission from a publisher to create a new edition/revision of a textbook or other work for which copyright is owned by the publisher and was previously released or published without the benefit of an open copyright (Creative Commons) license.

This is wonderful news. But how should one proceed? Here are some suggestions on steps to take to ensure that all is legal and correct.

Step 1: Double check copyright

Confirm that copyright is held by the publisher. If a book is available online, it might be possible to find it there and take a look at the copyright notice which typically follows or (in a printed copy) is on the back of the Title page. Publishers in this situation are typically the copyright holder for the entire book including all chapters, illustrations, images, etc.

Some publishers might prefer that the book be released using a CC BY-NC license so that they can retain the rights to sell physical copies of the book.

Step 2: Contributing authors and courtesy

When a publisher is the copyright holder for an entire book, there is no requirement to contact the contributing authors. However, you might consider doing so as a professional courtesy. It's possible that some of these authors would like to see the new edition, and may even be interested in contributing to it.

Step 3: Confirm the agreement in writing

There are two distinct items that will be openly licensed in this situation. One is the original book. The other are the adaptations and additions made by Jane Plain and John Smith, the adapting authors.

Because the publisher is the copyright holder, they are the only ones who can release the original book under a CC BY or open copyright license. To be clear and certain that you have permission to use and release this previously restrictively licensed work with an open copyright license, ask the publisher to confirm this agreement in writing.

Step 4: Write the adaptation statement

The new edition or revision is basically an adaptation. As such, be sure to include language used for an adaptation to the copyright notice. (See [Adaptation Statement](#) for more information.) However, the difference in this situation is that the original book was not published with an open copyright license. Below is an example of how the adaptation statement might read.

Big Publishing, the copyright holder of *The Basics of Biology*, has agreed to release it under a CC BY license. This makes it possible for a revised second edition to be made and CC BY licensed too. Jane Plain and John Smith are the copyright holders for all revisions (2017) and agree to release their changes and additions under a CC BY license. As a result this entire second edition of *The Basics of Biology* is released under a CC BY license. Changes and additions made to this second revised edition, are listed below:.

A list of changes and additions follows this statement.

Step 5: Share the adaptation statement

In advance of beginning your adaptation project, it is recommended that you spell out what the attribution statement for both the original content and the revision additions will say, and then share the attribution statement with the publisher (and maybe the contributing authors) to ensure that everyone is receiving appropriate credit.

Appendix: Style Guide

General Guidelines

- Avoid overuse of bold, italics, capitalization and colons.
- Use one space between sentences.
- Ensure consistency within a document regarding all style formats.

Abbreviations

- Geographical locations take periods except if occurring without them as part of a proper noun or brand.
 - British Columbia is abbreviated as B.C. unless in a name such as BC Open Textbook Project or BCcampus.

Commas

- Serial commas should be used consistently throughout BCcampus documents. This means putting commas between the elements of a series and before the final AND, OR, or NOR.
- Commas should always follow “e.g.,” and “i.e.,” as well as, “for example,” and “for instance,”.

Capitalization

- Capitalize all proper names, universities, agencies, ministries, associations, places and addresses.
- Where a reasonable choice exists use lowercase.
- Use lower case for “open education resources” (OER) and generic use of “open textbooks”.
- Use lowercase for descriptive Internet terms such as “email”, “website”, and “online”. Uppercase for proper names such as “Internet”.
- Capitalize all letters in abbreviations and acronyms: HTML, URL and RAM.

- Use lower case for file extensions as appended to a file name: .pdf, .docx.
- In main headings/titles capitalize the following:
 1. The first and the last word of the title
 2. Principal words such as nouns, pronouns (such as “you”), adjectives, verbs and adverbs
 3. Prepositions and conjunctions of four letters or more
 4. Lowercase the “to” in an infinitive (e.g., I want to play guitar)
- In sub headings use sentence case (only capitalize the first word).
- Pressbooks sections (parts, chapter, main body, front and back matter) are not capitalized unless the term is used as a name (e.g. ‘Part 1’) or is referred to as a selected menu item (e.g. “Add New Front Matter”).
- Pressbooks Views and Dashboard items are capitalized.

Lists / Bullets

- Introductory phrase: If the statement introducing the list is not a complete sentence* (a dependent clause) then a colon at the end should be used. Otherwise end a complete sentence with a period.
- List item punctuation:
 - If list items are complete sentences* use normal terminal punctuation (period, question mark etc.).
 - If items are sentence fragments or single words do not use terminal punctuation.
- Start each point in the list with a capital.
- Be consistent within a bulleted list for language and tense. All items should be syntactically and conceptually parallel. For example, start each bullet with a verb in present tense.
- Do not use hanging indents.
- Use a numbered list if documenting steps in a specific sequence otherwise use bullets.

*Note: Complete sentences require a subject, verb and complete thought. If one of these components is missing then it is a sentence fragment.

Bolding

- Bold the first use of a new key term and add it to the glossary.
- Define the term upon first mention within the text.

Hyphens

- Generic e-anything should be written with a lower case “e” and a hyphen before the word (e.g., e-reader) with exception for “email”.
- “Post-secondary” is always hyphenated.

Procedural documentation

- Limit the use of screen captures.
- Make the steps as brief as possible.
- Write in the present tense.
- Use boldface only upon first use of key terms that will be defined in the glossary.
- Use quotations to highlight names of menus, drop down selections and buttons.
- Use italics for fields or items that will be replaced with user text.
- Set off the text the user will insert with single quotes.
- Avoid using characters such as angle brackets (<>) or square brackets ([]) to designate text substitutions.

Example: From the “File” menu, select “Open”. In the “Open” text box, enter the URL below, substituting either ‘disk.dallas.utexas.edu’ for *server-address*, and your UT EID for *eid*.

Versioning History

This page provides a record of changes made to this guide. Each set of edits is acknowledged with a 0.1 increase in the version number. The exported files for this toolkit reflect the most recent version.

If you find an error in this toolkit, please fill out the [Report an Open Textbook Error](#) form.

Version	Date	Change	Details
1.1	March 29, 2016	Guide published in the B.C. Open Textbook Collection.	