

OpenStax's mission is to provide equity and access to education for everyone. We deeply value the diverse users of our books, and seek to include and impact each faculty and student in a positive and considerate manner. During our development processes, OpenStax undertakes substantial efforts to focus on the needs and experiences of students of all identities, in order to provide relevant and meaningful offerings that will foster a sense of belonging and engagement.

With the support of equity experts, educators, and students from different disciplines, populations, and organizations, we have created general guidelines for development and improvement. This document is a set of considerations and approaches, but it is not a style guide. We hope that it clarifies some of our processes and informs your approach, and that you utilize it and improve upon it as needed.

This is an ongoing and continually evolving effort. We value input on our approach, on specific items or additions we can consider to increase diverse representation, and especially opportunities to deepen the inclusivity and responsiveness of our material. While our current approach was developed with significant input from many contributors, we continue to seek the knowledge and feedback of those who utilize, build on, and learn with our materials.

Creating Inclusive, Equitable, and Representative Resources

Inclusive and equitable instruction requires active, intentional, informed, and flexible practice on the part of instructors, instructional designers, course material providers, academic support teams, and other contributors to the student experience. Inclusivity in education is a far-reaching and multidimensional requirement. In relation to course material creation, adaptation, and usage, we can consider the following aspects:

- **Active:** Direct and continual evaluation, examination, and improvement of what is taught, how it is presented and assessed, who is represented, and why certain choices are made.
- **Intentional:** Recognition of the complexity of adding or modifying materials or practice, and undertaking the effort to investigate what will be helpful without being hurtful.
- **Informed:** Dedication to learn about improved, current, sensitive, and evidence-backed approaches, opportunities, barriers, differences, and perspectives.
- **Flexible:** Willingness to adjust and adapt to new information and experiences, including those that challenge individual knowledge or discipline practice.

Course materials make up only a *portion* of the learning experience in most courses, but they can be key agents of inclusivity within that role. A textbook, learning object, or activity that considers and welcomes students, or that addresses inequity, can improve the success and outcomes of a course.

Based on the guidance of researchers and advocates, we identified components of most course materials that often manifest inclusion or exclusion. These components have been selected partly because they are present in course materials across the many education disciplines. And that presence, a wide range of resources can be analyzed, informed, and improved. We value and utilize other

approaches in addition to this one, but it has been relatively successful and helpful for us and our partners and adopters. This framework has been utilized in OpenStax development, in open pedagogy projects, in student cultural relevance reviews, and by other organizations in their own efforts.

We believe that building equity and including all students is an *active* process that considers all the different aspects of identities in the academic community. That means that we consider the needs and perspectives of students based on their race, ethnicity, gender identity, gender expression, sexual orientation, socioeconomic status size, ability, region, health, and age, as well as other characteristics such as group affiliations, family structures, socio-political perspectives, and others. We work with different groups, take different approaches, and focus on different areas of courses depending on the discipline. This framework is a guideline and an opportunity to go deeper.

The framework is presented in two formats: The table immediately below, and the set of more prose-style descriptions that follow it.

Component/ Item	Development Description and Requirement	Review/Editing Process
Narratives, explanations, applications, examples, and problem scenarios that relate to diverse audiences.	Ensure that diverse contexts are included, and that all examples are comprehensible by everyone. All this <i>while being sure to avoid stereotypes</i> .	<ol style="list-style-type: none"> 1. Review, and potentially have students review the material, problems and exercises, and examples, considering their context and inclusivity. 2. Review terminology, contexts, and situations presented in problems/applications to ensure that they are comprehensible by all populations. 3. Ensure that no juxtapositions or associations incorrectly stereotype a group.
Sensitivity, appropriate terminology, and careful treatment	<p>Ensure that all references to people, groups, populations, categories, conditions, and disabilities use the appropriate verbiage and do not contain any derogatory, colloquial, inappropriate, or otherwise incorrect language.</p> <p>For historical uses that should remain in place, consider adding context, such as “a widely used term at the time.” Ensure that quotations or paraphrases using outdated terms are attributed, contextualized, and limited.</p> <p>Overall Resource: https://www2.calstate.edu/csuo-system/csuo-branding-standards/editorial-style-guide/Pages/diversity-style-guide.aspx</p>	<ol style="list-style-type: none"> 1. Identify any outmoded or incorrect terminology and suggest the correct replacement or re-framing. 2. For historical references, if needed insert context, attribution, and/or quotations. 3. Since and terminology changes on a regular basis, and acceptability is not universal, do your best to identify and use the best terminology at the time.

<p>Illustrations, Photos, Graphics, and Alternative Text</p>	<p>Ensure they reflect diversity, and that we consider the intersectionality and context of the depiction (e.g. is anything perpetuating a stereotype, are all populations equally “active” in the art program, does the context or setting of the image indicate anything negative, etc.).</p> <p>Note: Because it is impossible to represent every population in every piece of art, consider illustration/artwork diversity on a holistic</p>	<ol style="list-style-type: none"> 1. Consider the quantity of images and illustrations, and the individuals and populations represented therein. 2. Consider the role, depiction, connotation, and purpose of the people represented and the image itself. 3. Ensure alternative text makes no incorrect assumptions.
<p>Example names</p>	<p>Ensure that people’s names used in examples, exercises, and scenarios representing various countries of origin, ethnicities, genders, and races.</p> <p>Ensure that names with particular ethnic or origin associations are portrayed properly; avoid negative comparisons or stereotypes associated with particular national origins or ethnicities.</p>	<ol style="list-style-type: none"> 1. Consider the diversity and representation overall on a quantitative and qualitative basis. 2. Consider – and seek other opinions -- whether names indicative of a particular race, ethnicity, or national origin associated with negative concepts.
<p>Major contributors, pioneers, named researchers/theorists, and creators of works featured in the material.</p>	<p>Ensuring that we recognize key contributors from all backgrounds, and that our real-world examples are also diverse.</p> <p>When historical figures in a field lack diversity, we must balance their inclusion with more current and diverse contributors.</p> <p>If still no direct <i>contributors</i> can be logically included, consider people impacted by the topic at hand, or contributors from related disciplines.</p>	<ol style="list-style-type: none"> 1. Consider the included figures in the field, and suggest additional contributors or groups. 2. Identify and suggest current researchers – demonstrating diversity – related to historical work. 3. Undertake this effort <i>opportunistically and creatively</i>. Do your best to <i>find</i> the places where people can be added.
<p>References/bibliography, and credits to research about or by diverse researchers/authors .</p>	<p>Determine if referenced papers or data have been sourced from diverse authors, researchers, and organizations.</p> <p>Note that diversity may not be perceptible when looking at a study, its authors, and other characteristics. And any inquiries should be undertaken sensitively.</p>	<ol style="list-style-type: none"> 1. Where diversity is perceptible, suggest more diverse references, papers, and data sources. 2. Seek out specific efforts and programs to drive inclusive citation, such as Cite Black Women.
<p>Keyword, glossary, and metadata representation</p>	<p>While the content itself is the primary element to consider, the keywords do signal priorities and importance; they can show how important a particular topic/issue is. Without creating any superficial or misleading sense of coverage,</p>	<ol style="list-style-type: none"> 1. Analyze keyword lists and/or glossaries identify core terms that are not represented or highlighted. 2. Consider alternative phrasings

	<p>consider the relevance and connection of these elements in relation to inclusivity.</p> <p>(Note that a book index is usually not fully representative of book content; they are often built by software, and search capabilities change their priority and comprehensiveness.)</p>	<p>and terminology.</p> <ol style="list-style-type: none"> 3. Consider adding keywords that specifically highlight issues important to underrepresented groups. 4. Ensure that definitions do not utilize inappropriate language or promote negative stereotypes.
<p>Presence and balanced perspectives on issues events, or concepts that are relevant to underrepresented groups.</p>	<p>Represent issues relevant to diverse populations, and ensure that we are not avoiding or underestimating the impacts on diverse populations. Examples include social problems, health issues, political issues, business practices, economic conditions, and so on.</p>	<ol style="list-style-type: none"> 1. For each topic/concept, consider the perspective of all populations in relation to controversies, arguments, alternate points, and so on. 2. Suggest additions to expose a varied point of view and widen the context for students.
<p>Diversity of viewpoints on multi-faceted, sensitive, or controversial topics.</p>	<p>Most discipline experts will defer to the academic viewpoint of any key concept, but they should consider alternative points of view.</p> <p>If a topic is inherently divisive or sensitive, indicate to editors that it should be specifically reviewed for balance/potential offense.</p>	<p>Same as above.</p>

Development Approaches

Students and faculty users represent a wide array of populations, socio-economic classes, geographies, types of college, ages, socio-political affiliations, and educational and cultural background and exposure. Whether or not these users represent formally protected classes, it is our responsibility to consider and include them in our courses and materials. We can do that both from the core of the approach -- *what* is covered and *how* we cover it -- and also in surface-level manifestations.

Project Vision

When developing material, consider the structural components of the course/discipline, the issues/reform areas often discussed regarding that course, and the engagement opportunities to better address inequities and welcome students into the course. With all that said, tables of contents and learning outcome lists will likely be in 90% alignment with mainstream courses -- that's still may be required for adoption -- but some elements within that table of contents and especially how it is expanded in the material should reveal differences and forward-movement.

Structural Considerations

- Which topics and learning outcomes could be added to better reflect inclusivity?
- For courses heavy in readings/primary sources rising to the level of a "canon" -- which materials should be added to that canon, and which can be removed?
- Where should explanations of equity and diversity concepts, social justice issues, privilege, gaps and divides, and other explorations be *added* to the material and discussion?
- In which cases might accepted discipline practice, validated terminology, and other norms be behind the needs of students, and how should those issues be addressed?
- How do we balance between confronting the damaging aspects of our culture and history and celebrating those who have driven change and overcome challenges?
- How do we support students, assess student understanding, assign course-related work, and provide opportunities for growth and practice in sensitive and equitable ways?

Development and Review Components

We have identified the following areas and elements where diversity, equity, and inclusivity are most relevant and visible within textbooks. As with any list, this is limited and general, but it has been the most universal across many discipline areas, and represents a starting place for further work.

1. Narratives, application, examples, and exercises/problems

- a. Write and use contexts and examples that include diverse people and their lived experiences, without aligning them with stereotypes or associating groups with purely negative outcomes.
- b. Create real-world practice problems and applications that pertain to situations and contexts inclusive of all populations.
- c. Avoid negative stereotypes or sensitive subjects in problems and applications, unless the subject matter demands it.
 - i. For example, a section on mental health may require assessments on suicide rates or prevention, but a math textbook can likely do without that subject matter.)
- d. Be certain that no exercises/problems require a specific knowledge or context that may be absent from certain individuals, or that may produce a negative connotation.
 - i. Make no assumptions about prior knowledge, especially from different subjects/cultural contexts. For example, in a US History course, do not assume that everyone has read *The Red Badge of Courage* or has seen *Saving Private Ryan*; in an Astronomy course, do not assume students have cooked when discussing heating/cooling. Even very common cultural elements such as *Harry Potter*, Disney, or popular game shows are not universal.
- e. Note and describe where equity issues, cultural references, social inequality, and group/identity differences pertain to the topic or discipline at hand, or where data/information is limited or incomplete.

2. Sensitivity, appropriate terminology, and careful treatment

- a. Ensure that all references to people, groups, populations, categories, conditions, and disabilities use the appropriate verbiage and do not contain any derogatory, colloquial, inappropriate, or otherwise incorrect language.
- b. Note that the placement, juxtaposition, or context of a group's inclusion or the association of a certain group with a negative behavior or outcome can be equally problematic.
- c. In most cases, usage of outmoded terminology in historical situations (e.g. court cases, laws, articles) should be clearly defined in quotations or annotated with contextual information, such as "as stated in the decision," or "as commonly referred to at the time."
- d. If slurs or other offensive language or accounts *must* be included -- such as in primary sources or literary works -- contextualize them and ensure instructors are aware of their presence. Consider their impact on people reading the material and in the course environment, and understand that there are deep and varied sensitivities in this arena.
- e. Be particularly aware of references or notes regarding any group or population as they appear anecdotes, "for examples," quick references, and so on. Be very careful of synonyms or associations, particularly regarding ethnicity, national origin, and religion.
- f. Recognize that appropriate terminology is changing all the time, and do your best to use current verbiage. Consult style guides as necessary; note they may be in conflict. Do not feel obligated to use the very latest term if it is not widely used or is controversial. Some example style guides:
 - i. **General:** <https://www2.calstate.edu/csu-system/csu-branding-standards/editorial-style-guide/Pages/diversity-style-guide.aspx>
 - ii. **GLAAD Media Reference Guide:** <https://www.glaad.org/reference>
 - iii. **PFLAG Glossary of Terms:** <https://pflag.org/glossary>
 - iv. **Teaching Tolerance Terms/Definitions:** <https://www.tolerance.org/magazine/publications/best-practices-for-serving-lgbtq-students/lgbtq-terms-definitions-the-acronym-and-beyond>
 - v. **Gender-Inclusive Biology:** <https://www.genderinclusivebiology.com/>
 - vi. **National Association of Black Journalists Style Guide:** <https://www.nabj.org/page/styleguide>
 - vii. **Racial Equity Tools Glossary:** <https://www.racialequitytools.org/glossary>
 - viii. **Religion Stylebook:** <http://religionstylebook.com/entries/letter/a>
 - ix. **Mental Health Style Guide:** https://emmresourcecenter.org/system/files/2017-11/Reporting_on_Mental_Health_ENG.pdf
 - x. **GLSEN Gender Terminology Guide:** <https://www.glsen.org/activity/gender-terminology>
 - xi. **Disability Style Guide:** <https://ncdj.org/style-guide/>
 - xii. **Longer-form gender inclusivity considerations:** <https://writingcenter.unc.edu/tips-and-tools/gender-inclusive-language/>
 - xiii. **Involvement with criminal justice system terminology guidance:** <https://www.themarshallproject.org/2021/04/12/what-words-we-use-and-avoid-when-covering-people-and-incarceration>

As long as it is, this is a *non-comprehensive* list and doesn't consider every person. Anything that affects a person should be considered in terms of the words used to describe them.

- g. Avoid idioms or colloquialisms, particularly those that will lead to misconceptions among those who natively speak other languages or who may not have the educational or cultural context to understand them.
- h. Regarding people-first and identity-first language, note that many people, groups, and populations are best referred to with people-first language, especially when speaking about individuals in the general sense. However, certain groups prefer identity-first language *or* the usage is not universal.

3. Illustrations, Graphics, and Alternative Text

- a. Include diverse subjects and people.
- b. Consider background (literally), context, depicted actions of the subjects, juxtapositions, expressions of authority, connotations, and so on. Ensure that a certain group is not depicted in a manner that unfairly or unnecessarily connotes a stereotype or a negative association. And ensure that people of different backgrounds are equally depicted actively and in positive and empowered roles.
- c. Consider any images that include or depict abuse, brutality, subjugation, injury, death, or other pain and ensure that the image is absolutely necessary and that it is used in a non-exploitative manner.
- d. Note that hate speech, racial slurs, and other elements may be present in images (e. g. protests); while the decision to include such material depends on the judgment of the developer and reviewers, but be certain that such judgment is applied to images as well.
- e. Alternative text for images of people should make no assumptions regarding gender, race, ethnicity, role, or other categories or characteristics unless it is in the rare case that such descriptions are critical to the image. (In other words, do not assume that an adult with a child is necessarily the child's parent unless that is clear or necessary.)
- f. Not every image can include every population or consideration, so consider how these guidelines play out across the entire work or course.

4. Example names

- a. Include diverse names representing various national origins, ethnicities, genders, etc.
- b. Avoid stereotypes associated with certain names or names that present in a certain way.

5. Key figures, pioneers, and contributors to the field

- a. *Find opportunities* to add contributors from underrepresented genders, races, ethnicities, geographies, and other populations.
- b. Avoid isolating diverse contributors to specific sections – i.e. “multicultural impacts on Psychology.”
- c. Where key/historical figures are not diverse, include current, more diverse researchers/figures for balance.
- d. Consider accepted “discovers,” “creators,” “inventors,” and others credited within a field or in culture, and investigate opportunities to credit influencers or parallel developers. For

example, Pascal didn't invent Pascal's triangle; including Pingala, Al-Karaji, and Jia Xian offers great opportunity for deeper and more accurate cultural reference.

- e. Where key/historical figures are not diverse, consider people from **related fields** who may be from underrepresented populations: a biologist who applies a chemical principle, an economist who studies a sociological concept, a political scientist who influences a historical interpretation. While these might seem tangential, they will be memorable and relevant to students and incorporate the interdisciplinary nature of academia and society.

6. Keywords/glossary items

- a. Ensure that diverse topics and terms are represented in keywords or glossary.
- b. Ensure that sensitivity and care regarding current and accepted terminology is utilized in both the terms *and* their definitions.

7. Balanced issues and discussions

- a. Consider and include issues and situations that pertain to diverse populations. When discussing problems, conditions, or issues, be sure to include those that affect an array of populations and groups.
- b. Be aware of stigmatizing victims or those having a specific condition, occupation, experience, or background.
- c. Be aware that certain controversial topics, when necessary to include, should be described in a balanced manner.
 - i. If a discipline has accepted a specific position a topic (e.g. climate change, sexual orientation being partially determined biologically, etc.), describe that position.
 - ii. If a socio-political issue without a consensus must be described (e.g. campus carry, voting rights), then do your best to include a balanced viewpoint.
 - iii. Avoid characterizations that lead to generalization – e.g. “rural communities tend to support gun rights.” If a generalization like that must be stated, provide more context, such as why, and include any counterpoints from “within” that generalization.
- d. Note that the absence of a person or issue can sometimes be akin to a negative portrayal or an imbalance. E.g. highlighting one president's accomplishments but omitting their immediate predecessor's may be imbalanced.
- e. Consider the impact of active versus passive voice and individual identification when related to actions, policies, ethical lapses, beliefs, or statements. For instance, when is it appropriate to name the bad actor who designed an unethical practice, and when might simply describing the events be more appropriate?
- f. Be aware that bringing awareness to social injustices, mistreatments, challenges, and negative outcomes regarding a certain population or group is often necessary and accurate, but that it may have the effect of stigmatizing that group, particularly when not balanced with positive outcomes and people who have overcome challenges, inequity, and mistreatment.

8. References

- a. While finding diversity in referenced academic journal articles and other published research may be difficult to the point of impracticality, please do what's possible to consider it. This may be easier in some disciplines or journals than others.
 - i. For example, *Sociological Science* includes diversity information in its author biographies -- <https://www.sociologicalscience.com/about/analytics/> -- but we acknowledge that not all journals and fields do so.
- b. Perhaps more importantly, if you are including less formal, **in-text mentions of specific researchers or studies** (as is very common in Psychology textbooks, for example), these should be as diverse as possible.
- c. We recognize that diversity in academic journals and departments is far behind where it should be, which impacts the opportunities you have to represent all populations in a course resource. Again, please work to identify specific opportunities in your discipline, and partner with your editors and teams to potentially engage with academic organizations focused on DEI in your field.