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PRACTICE ARTICLE

Brick by Brick: Marketing Strategies for Building an Open Educational Resources Office

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ABSTRACT

Introduction: This article examines the current marketing and advocacy trends utilized by librarians who work within the realm of open educational resources (OER) and posits that utilizing marketing industry trends, such as relationship marketing, when building an OER office can enhance current marketing trends—as illustrated at Texas Tech University—and aid in the sustainability of the office or program.

Literature Review: The literature review begins by providing a broad definition and understanding of relationship marketing as marketing industry strategy. It then continues with literature that explores popular OER marketing and advocacy trends that are used by librarians, specifically trends that focus on building relationships with faculty.

Incorporating Relationship Marketing into the Texas Tech University OER office: The Texas Tech University OER office was created in 2021 and has found ways to incorporate relationship marketing strategies into the development of the office. These strategies build upon current trends by prioritizing faculty relationships and needs in the development of workflows, advocacy efforts, and funding programs.

Next Steps: The Texas Tech University OER office is continually using faculty feedback to make changes and determine next steps to create a sustainable OER program.

Keywords: open educational resources, relationship marketing, marketing, outreach, advocacy

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INTRODUCTION

In recent years, there has been an emerging new field of advocacy. This new field is the adoption and use of open educational resources, or OER. In examining the acronym, the elements of OER can be understood. First and foremost, the materials must be open. “Open” means several things, but it can be understood as something that is accessible to all students without obstacles such as paywalls or high prices. The phrase “educational resources” implies that these elements that are open are not merely the traditional book publishing model, but they can also include elements like quizzes, lecture notes, and other supporting materials that make up the parts of a complete course.

The elements of OER and the advocacy for these course materials have taken root in academic libraries across the United States. This is largely due to the long history of librarians advocating for and providing access to information that is open and easy to use. However, advocacy alone is not necessarily enough to break the traditions of teaching faculty. What is needed is an adoption of a multi-pronged approach to advocating and educating faculty about open resources and encouraging them to utilize these materials in their courses so that students can benefit from lowered material costs, which in turn helps retention and graduation. This article serves as the first brick in the construction of an approach that centers on the utilization of marketing industry standards during the creation and deployment of an OER office that is focused on the experience of faculty OER adopters and creators. To understand how utilizing marketing industry standards when building an OER office and advocating for OER usage differs from current advocacy strategies, first, it is important to examine some of the literature on different marketing strategies, focusing on relationship marketing. Second, it is necessary to understand some of the existing literature on current trends for outreach and advocacy of OER specifically. As the title suggests, building an OER office that utilizes marketing techniques must be done using several different marketing tactics to create a holistic approach. The focus of this paper is on relationship marketing and how building close relationships can help develop further avenues of marketing and OER adoption success.

LITERATURE REVIEW

The combination of marketing industry principles and examining current OER marketing trends within academic libraries can serve as a guide for other libraries to follow as they develop OER offices or programs. This literature review will focus on two key components, beginning with an examination into how relationship marketing is created and deployed and concluding with an analysis of what the OER literature has to say about current advocacy trends and limitations. While current advocacy trends for OER can be impactful, there are ways that

librarians can employ current marketing industry strategies to address limitations with these trends and encourage the adoption of OER materials.

Relationship marketing

Relationship marketing is one type of approach to marketing a product or idea. Relationship marketing is also one element within a larger comprehensive marketing plan. However, for the purposes of creating an OER office and the widespread OER adoption on university campuses, relationship marketing can often serve as the cornerstone for the larger marketing plan, the first brick so to speak. Often utilized by businesses, relationship marketing principles are applicable in other areas as well. Copulsky and Wolf (1990) defined relationship marketing as follows:

... A combination of general advertising, sales promotion, public relations, and direct marketing to create a more effective and more efficient ways of reaching consumers Relationship marketing has three key elements, 1. Identifying and building a database of current and potential consumers which records and cross-references a wide range of demographic, life-style, and purchase information; 2. Delivering differentiated messages to these people through established and new media channels based on the consumer's characteristics and preferences; and 3. Tracking each relationship to monitor the cost of acquiring the consumer and the lifetime value of his purchases (pp. 17–18).

The definition of relationship marketing provided above forms a good baseline for understanding how an effective relationship can develop between the seller and consumer. The key distinction between relationship marketing and other forms of marketing is that relationship marketing seeks to build long-term interactions and relationships with customers and can serve as a personalized form of communication. A question remains, however, regarding how these relationships are developed.

Ford (1980) offers five stages for the development of relationships. Stage 1 is the pre-relationship stage where the buyer and seller are evaluating each other. This is defined by the experience between them, the uncertainty level of the relationship, and the distance between supplier and seller. Stage 2 is the early stage. This stage is highlighted by the commitment between the two parties and the adaptation to the different conditions of experience, uncertainty, distance, and commitment. Stage 3 is the development stage. This is highlighted by the increase in the informal adaptations to each partner and the cost savings increase. In this stage, the experience between them is increased, uncertainty continues to decrease, and the distance is also reduced. Stage 4 is the long-term stage. This stage is highlighted by extensive adaptation

and cost savings. Stage 4 is marked by high levels of experience between the parties, a minimum amount of uncertainty, and a minimum amount of distance. Stage 5 is the final stage. This stage is highlighted by extensive institutional partnerships and established code of ethics between each partner. Understanding the stages of development of relationship marketing can be useful in determining where the OER librarian may be in assessing the different relationships on campus, and where faculty may be in the process of adoption or use of OER materials.

Payne et al (2005) further refined the concepts of relationship marketing and the relationships themselves into six distinct stakeholders, each with a relationship that needs to be maintained. The six stakeholders are customers, referrals, influencers, employees, suppliers, and finally internal. Understanding the six different stakeholder groups gives more nuance to the type of relationships that need to be maintained in the relationship marketing model. It is possible to see different stakeholders of a university fitting within these six types of stakeholder categories. For example, faculty could be customers, while university administration, such as a provost, could fall into the supplier role since they provide the necessary resources to the library.

As Morgan and Hunt (1999) argued, efficiently allocating resources derived from relationships can help give businesses a competitive advantage. The types of resources that can be gained are financial, legal, physical, human, organizational, relational, and informational (pp. 283–284). Morgan and Hunt concluded that competitive advantage wrought by relationship marketing must always be kept in check by ensuring that the relationships are reciprocal both in the short term and in the long term. This is a critical point to remember when examining the role of the OER office and the relationships they potentially build with faculty and other areas on campus. Understanding relationship marketing as a transactional action is also addressed by Mudambi and Mudambi (1995), who examined the importance of supplier relations within the relationship marketing model. The authors found that while supplier and buyer relationships are adversarial in nature, there is evidence of closer relationships even within an adversarial model. This perspective is especially important when considering how faculty members and OER librarians or OER suppliers may be viewed as adversaries within the process, since the adoption of an OER may run counter to tenure and promotion processes. Todorinova and Wilkinson (2020) noted in a survey done by Ithaka S+R that untenured faculty were less interested in creating OER because it was not valued as highly in their tenure and promotion processes.

Practical applications of relationship marketing

Scholars such as Palmer (1995) have also sought to address relationship marketing on a local level to demonstrate a practical application of relationship marketing principles. Palmer concluded that research into the values of local organizations is important before

entering a relationship marketing process. While Palmer was examining the relationship marketing between different countries and cultures, understanding local values is a useful concept for OER librarians as well, to strengthen the faculty–librarian relationship. Perrien et al. (1993) demonstrated the role of relationship marketing in commercial banking as being in a transition from transactional to relational. Banking shifting from a transactional interaction to a relationship interaction necessitated more personal interaction between the clients and the bankers. Additionally, Perrien et al. (1993) recommended six strategies for developing relationships within the commercial bank: commitment from the higher executives, a redefinition of profit centers, a selection of targeted customer segments, human resource policies that stress relationships, decentralization of authority to manage relationships better, and a simplification of overall policies for customer understanding.

A recent study by Jain et al. (2022) viewed relationship marketing as a “critical medium to connect ... [with] stakeholders and enhance engagement in changing times” (p. 3) and argued that higher education should focus on building and maintaining relationships with stakeholders in an ever-evolving digital landscape. This view of relationship marketing is especially prevalent in how it relates to building an OER office that will be advocating for OER adoption and creation. As faculty are becoming more aware of OER and courses are rapidly moving to digital spaces, it is important for librarians to remember that continuous relationship building with faculty and introducing services to meet their changing needs is vital to a sustainable OER office or program.

Current OER marketing strategies

When looking at the literature, there are many commonalities in how OER programs and coordinators are choosing to conduct their marketing efforts to advocate for the adoption of OER on their campuses. Some of these more common advocacy trends include one-on-one meetings with faculty, “one-shot” meetings with academic departments and other faculty groups on campus, varying professional development opportunities, and creating monetary incentives, i.e., stipend or grant programs, for faculty to adopt or create OER.

Meeting with individual faculty can be a great way not only to communicate the benefits of OER but also to allow OER advocates the opportunity to address any questions or concerns that individual faculty members may have. In recent studies (Belikov & Bodily, 2016), common hesitations for faculty choosing to adopt, adapt, or create OER have been concerns about quality, an unclear understanding of Creative Commons and copyright for open materials, technical confidence, and sustainability and time commitment. There are usually several ways that OER advocates can solicit this one-on-one time with faculty at their institutions. One common outlet is the use of an “OER consultation” form that can be found on a library guide or other institution web presence that is devoted to OER (Stafford, 2020). These forms

are typically filled out by faculty who are already interested in adopting OER into their courses and want to meet with someone who can provide that assistance.

To help reach a wider range of faculty, some OER librarians will also meet with an entire department or faculty bodies, such as a faculty senate. These meetings will typically operate similarly to a library one-shot instruction session, in that these meetings will likely happen once a semester and the librarian will talk about OER in a general sense, highlight some common repositories, and provide a few examples of materials that are related to that specific discipline. These meetings can also include meetings with academic administrative bodies such as the Dean's Council. Katz (2019) points out that by conducting these meetings, the library can position itself as the authoritative voice on OER expertise and advocacy. While these instruction sessions can be useful, due to time constraints, they may not always provide a holistic view of all the services that the library and other areas on campus have to offer that relate to OER adoption or creation (Cooke et al., 2022).

The University of Washington Tacoma developed an OER program that focused on choice and user needs, and it provided faculty with a stipend for their participation: \$500 per option (Petrich, 2020). The library offered two options for participation. The first option asked that faculty participate in a two-day workshop that focused on finding and using OER. The second option asked faculty to submit a report that analyzed the “needs and barriers to OER adoption on campus, assessing the quality of OER in their discipline, and outlining plans to adopt OER in an upcoming course of their choice” (Petrich, 2020, p. 493). The decision to provide multiple options for faculty was an effort to eliminate barriers for those faculty who may be interested in learning more about OER but were not ready to adopt. While this program was designed to be user-centered, Petrich notes that a limitation of their program was not following up with faculty throughout the duration of the program and that providing this point-of-need outreach “may have also helped to reinforce the relationships and habits” (2020, p. 499) with the faculty who participated in the program.

Developing grant or stipend programs at your institution allows for faculty and/or staff to receive additional compensation for the time and labor that is necessary to adopt or create an OER. The makeup of these grant or stipend programs will generally vary depending on the institution's financial capabilities and the needs of the students (Elder & Gallant, 2022). Some institutions may decide to implement smaller grants that provide funding for faculty to adopt but not create an OER. Other institutions may decide to create a scale where funding amounts vary depending on whether the faculty member is adopting an existing OER as opposed to creating an entirely new OER textbook. According to Gallant (2022), developing monetary incentive programs not only supports the growth of OER adoption, but it also provides faculty the agency to determine and choose the resources that are best

for their courses as well as their students. While these stipend programs can provide a helpful incentive for faculty, Hollister and Patton (2022) found in their survey that more needs to be done to address additional barriers that faculty have, such as finding ways to provide the time needed to create quality educational materials, in addition to providing funding.

Summary

The literature above is only a small selection of relevant articles demonstrating the basic tenants of relationship marketing and the current trends in OER marketing. Many of the OER tactics now are based in education or raising awareness through a series of disjointed tactics; however, what is needed is a more holistic and direct approach. While the current trends can be impactful, they continue to have limitations that may not be fully addressing faculty concerns with OER adoption and creation. Some of these concerns include having the time to devote to creating quality materials, workshops or presentations not showcasing all the library and campus services that are related to OER adoption and creation, and not maintaining consistent outreach and communication with faculty post OER programs or events. Relationship marketing principles offer the foundations for beginning to build an effective OER office or program that can begin to address the concerns listed above. Applying the principles of relationship marketing can give the librarian the tools needed to develop and maintain the necessary faculty relationships that surround the adoption and use of OER on a university campus. Understanding these principles, it is possible to describe how these have been put into action as part of the Texas Tech University Libraries OER office.

INCORPORATING RELATIONSHIP MARKETING IN THE TEXAS TECH UNIVERSITY OER OFFICE

Prior to the development of the OER office within Texas Tech University Libraries in 2021, marketing OER to faculty and other campus stakeholders followed many of the current OER marketing strategies mentioned in the sections above, such as hosting workshops, giving presentations, and promoting OER adoption and creation through annual events like Open Access Week. The Texas Tech University OER office sought to build on these current trends by incorporating a user-centered approach in all marketing and outreach tactics. Below are a few examples of how the OER office has incorporated relationship marketing into its workflows, advocacy efforts, and funding program that begin to address some of the limitations of current advocacy trends.

Building a “database” of current and potential OER adopters

To begin building a “database” of current and potential OER adopters at Texas Tech University, the OER office created a spreadsheet that was adapted from the “lead tracking”

spreadsheet used in the OpenStax Institutional Partnership program (OpenStax, 2021). The Texas Tech University adapted spreadsheet listed the names of faculty members who had adopted OER, the department and college the faculty members were in, the semester that the faculty member first adopted the OER, the faculty member's institutional email address, and columns that tracked when/how the faculty member had been contacted by the OER office. One of the columns also addresses the date that the OER librarian and faculty met, either virtually or face-to-face, to talk about OER. It is important to note that this spreadsheet is separate from the "Texas Tech University OER Adoptions" data. The decision to keep the spreadsheets separate stems from the principles of relationship marketing. Rather than focusing solely on the OER adoptions and the potential cost savings, this separate adopter's spreadsheet tracks the communication and sustainability of the reciprocal relationship between individual faculty members and the OER office. Since the Texas Tech University OER office is tracking when faculty members are contacted, it ensures that communication is continual in the long term. Not only has this frequent communication allowed for faculty members to ask questions and for the OER librarian to address concerns early in the OER adoption process, but it has also been helpful when connecting new faculty who are interested in OER to others in their area who are currently using OER in their courses.

The faculty included on this adopter's spreadsheet are both current and potential OER adopters, and the OER librarian collects the names several ways. In keeping with current trends in OER advocacy efforts, faculty at Texas Tech University can complete an "OER Consultation" form or email the OER office directly to schedule a meeting with the librarian. Following an OER event or workshop on campus, the OER librarian maintains an attendance sheet. Those who attend are added to the spreadsheet and are contacted via email by the OER Librarian. While the faculty who attend events are not always interested in adopting right away, tracking communication with them can be helpful in building a relationship with them if they were to contact the OER office in the future since the librarian would already have their information.

Customizing messaging and presentations to OER adopter preferences

The second element of relationship marketing suggests customizing messaging to be aligned with groups of customers based on similar preferences. When building and sustaining relationships with faculty, librarians should be cognizant of the comfort level that faculty have with OER. Some faculty may be new to the concept, while others will have published multiple OER textbooks in the past. Creating messaging and marketing to this spectrum of expertise can be easier if relationship marketing is considered. One way that the Texas Tech University OER office has attempted to tackle this challenge is through the creation of an annual Fall OER Workshop Series in 2022. This workshop series consists of three workshops that take

place throughout the fall semester and is part of the Texas Tech University Teaching, Learning, and Professional Development Center's (TLPDC) New Faculty Orientation event.

These presentations correspond to three levels. Level 1 is “Learn.” Presentations that fall under level 1 cover the basics of OER, such as defining what these resources are and how to begin finding them. Level 2 is “Create.” This level features presentations that tackle the complexities of creating and publishing OER, such as addressing the time that would be needed to publish an original OER textbook. The final is level 3, and it is called “Apply.” The presentations within this level provide examples and ways that faculty can apply OER and other open educational practices in their pedagogy and courses. Descriptions of the levels are placed on all promotional materials, as well as in the beginning of each presentation. For example, if a presentation is part of level 1, a slide at the beginning of the presentation will feature information about the level. All levels are also assigned a color that is part of the Texas Tech University OER office official logo, and these colors are used on the marketing materials as well as the presentation slides.

Structuring the presentations in this way allows faculty to easily identify and select a presentation at a level that they are comfortable with based on their preferences and expertise with OER. New faculty are also able to evaluate how the OER office addresses faculty questions surrounding OER adoption. The OER librarian is also able to better understand where a majority of new faculty lie along the spectrum of OER expertise based on how many attend each presentation.

The scaffolded nature of the presentations also allows the OER librarian to welcome guest presenters from other areas both within and outside of the library to discuss how their area relates to OER adoption or creation. For example, in the 2022 workshop series, the level 3 presentation was given by two instructional designers who discussed how to implement OER into the campus learning management system and how to ensure that the OER faculty selected met accessibility guidelines. Introducing guests from the library and other areas on campus illustrates the collaborative mindset that is important for any OER office to be sustainable, and it also has the added benefit of potentially introducing faculty to services that they may not have been aware of before.

From transactional to relational incentives

Like many institutions, the Texas Tech University OER office established a tiered funding system for faculty who are interested in adopting or creating OER in 2022. While funding provides a great incentive to faculty to support OER adoption, the Texas Tech University OER office sought to find ways to make its funding program both transactional as well as

relational. Rather than simply handing faculty money and then getting an output in return, the Texas Tech University OER office also created a Microsoft Teams site for awardees. Not only did this Teams site provide faculty with easy access to helpful documentation, it also served as a place where awardees could use the “Posts” section to ask questions, communicate informally with other awardees, or share other types of helpful information as they were working on their projects. The goal of this site was not only to encourage relationships between the awardees but also to decentralize authority on OER away from the OER librarian and include the faculty in knowledge sharing of OER creation. During the 2022–2023 award year, two of the six awardees tended to utilize the Teams site regularly.

While the OER office at Texas Tech University is currently unable to offer course release time for faculty who are given funding for publishing original OER textbooks, the office has attempted to address the concerns related to time needed to produce quality educational materials. As part of the funding program, the OER office allows faculty one full academic year (fall semester through the entire following summer) to complete these textbooks. The faculty who are creating these OER textbooks are also required to schedule monthly meetings with the OER librarian. Typically, the librarian will schedule these meetings for an hour so that questions and concerns can be addressed, and so the faculty member will also have some dedicated time each month when they are able to focus on their project. As was noted previously by Hollister and Patton (2022), funding stipends can aid in OER adoption and creation, but it is important to remember that the money cannot be the only incentive that faculty need to create quality materials.

NEXT STEPS

As mentioned by Morgan and Hunt (1999), the reciprocity encouraged by relationship marketing is vital in maintaining short- and long-term relationships. To build and sustain the relationships made with faculty, the Texas Tech University OER office regularly solicits feedback on its events and programming to ensure that faculty concerns are heard and needs are met.

Improving based on feedback

The Texas Tech University OER office continues to find ways to incorporate relationship marketing into its marketing strategies. The first will be through the 2023 Fall OER Workshop Series. Following each presentation during the 2022 series, the OER librarian sent attendees an optional questionnaire that asked the following questions:

1. Are you interested in adopting OER into your course(s)? Why or why not?
2. What was your biggest takeaway from today’s presentation?

3. What questions and/or concerns do you have about OER?
4. Would you be interested in meeting 1:1 with the OER librarian to further discuss OER?
5. What other workshops related to OER would you like to see?

Not only has the feedback provided from these responses affected the overall programming of the 2023 Fall OER Workshop Series, but it has also helped to inform how the series will be marketed going forward so that it continues to appeal to faculty. One change is that the workshop series will be marketed to the faculty at large, not just new faculty.

When the OER librarian was marketing the OER funding program in 2022, there was no mention of the Teams site that would be created or the support that awardees would find in one another. Following informal conversations with the 2022–2023 awardees who actively utilized the service, the OER librarian adjusted presentations and other promotional materials to include “teaser” information about the Teams site and the ways that it could be utilized by the awardees for the 2023–2024 funding round. After examining the usage of the Teams site by the 2023–2024 group of awardees, the OER office will determine whether the current informal environment is effective or whether a more formal community of practice should be established. The OER office will also look for other ways to market the aspect of community and support to faculty going forward.

Something to consider

One thing to consider when deciding whether to use relationship marketing as a framework when developing an OER office is the workload of the librarian or OER advocate conducting the work of OER advocacy at their institution. Texas Tech University is fortunate to have a position within its libraries that is dedicated to leading their OER effort. Since OER work is the primary responsibility of this librarian, it has enabled them to have the time to focus on all the principles outlined in relationship marketing for their advocacy. Relationship marketing requires the librarian to devote additional time and resources to continually reaching out to faculty, and for some, this level of consistent communication may be difficult due to workload. The authors hope that OER advocates, regardless of workload, may find something in our examples that can be easily adapted to better meet the needs of their institution and present situation.

CONCLUSION

OER librarians have many tools in their arsenal to advocate for the adoption of OER by the faculty at their institutions. Some of the common outreach and marketing trends for OER

programs are meetings with faculty, departments, and larger faculty groups, creating various professional development opportunities for faculty, such as a workshop, and providing a form of monetary incentive. While the current trends can be effective, the Texas Tech University OER office wanted to deploy a more holistic approach that utilized marketing industry standards as the office was being established and expanded beyond current trends. One of those standards, which was the focus of this article, was relationship marketing, which focuses on the ways in which a brand or company builds and sustains rapport with its consumer base. While not every higher education institution will engage in the same marketing and advocacy trends when it comes to OER, this article has provided some examples of how the relationship marketing strategy centers the user and assists in creating relationships with faculty that will last and, hopefully, be the first brick that libraries can use as they seek to develop OER programs.

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