

Draft Southern Oregon University Textbook Affordability Plan
Academic Years Fall 2021 - Fall 2024
By the OER Advisory Group

Introduction

This Textbook Affordability Plan seeks to guide the work of promoting OER adoption at Southern Oregon University (SOU) to advance student success and equity in access to higher education. Included in the plan are initiatives for SOU staff and faculty to complete for reaching compliance with three Oregon laws related to textbook affordability and cost transparency.

As defined by [UNESCO](#), open educational resources are “teaching, learning, and research materials in any medium – digital or otherwise – that reside in the public domain or have been released under an open license that permits no-cost access, use, adaptation and redistribution by others with no or limited restrictions.” The costs of traditional textbooks continue to rise and the use of OER can help remove or decrease a financial barrier to higher education. OER allow faculty and others to retain, reuse, revise, remix, and redistribute materials to tailor those materials to the needs of the students in the course and the student learning outcomes. Many OER textbooks and other course materials are peer-reviewed, such as OpenStax textbooks and the Open Textbook Library collection.

According to a large-scale [2018 study by Colvard et al.](#), using OER saves students money, as well as improves grades and decreases drop, fail, and withdrawal (DFW) rates for all students. The authors of the study also found that OER improved course grades at higher rates for Pell recipient students, part-time students, and underserved populations. In addition, OER allow students to have access to their course materials by the first day of class, so students are more prepared to learn. OER are usually offered in digital format, but often students have an option to order a low-cost print copy, such as the OpenStax textbooks. Utilizing OER will improve affordability and access to educational opportunities. OER adoptions by faculty will also support student retention, as well as benefit underrepresented students on our campus.

Oregon Laws Related to Textbook Affordability

[House Bill 2871](#), passed in 2015, requires every Oregon public university to prominently designate courses whose course materials exclusively consist of open or free textbooks or either no-cost--\$0 for required texts or low-cost--under \$50 course materials at the

time of registration. The course designation must appear in the published course descriptions that are on the Internet or are otherwise provided to students at the time of course registration, including on the campus bookstore course materials list that is provided for the course.

[House Bill 2213](#), passed in 2019, requires Oregon's public community colleges and universities to develop a textbook affordability plan for their campus, which:

- Includes measurable goals for increasing textbook affordability
- Establishes a target amount of student savings from adoption of the Plan
- Addresses how to mitigate economic impact to campus store
- Addresses how to advertise low/no-cost designation to students
- Contains an academic freedom statement
- Includes process for faculty to find out about low/no-cost course materials
- Includes a least one student representative in the development of the Plan

[House Bill 2919](#), passed in 2021, requires each public university and community college to prominently display, or establish link to website that displays, estimated costs of all required course materials and directly related course fees for no less than 75 percent of total for-credit courses offered by public university or community college (beginning Fall 2022).

OER Advisory Group Members

In May 2021, Holly Gabriel was hired as the Open Access and Government Information Librarian. Her responsibilities include coordinating OER initiatives on campus and reporting SOU OER data to Open Oregon Educational Resources and the Higher Education Coordinating Commission (HECC). In June 2021, an Advisory Group was formed to begin development of the Textbook Affordability Plan. Members of the Advisory Group include:

1. Adam Corman, Bookstore Director
2. Holly Gabriel, Open Access & Government Information Librarian (Chair)
3. Rebekah Kenney, Student Representative
4. David Pouliot, Assistant Professor, Computer Science
5. Larry Shrewsbury, Senior Instructor, Mathematics
6. John Taylor, Professor, Psychology
7. Dale Vidmar, Interim University Librarian
8. Winter Woods, Academic Scheduling Coordinator

Vision for OER Advisory Group

Vision: To increase the number of faculty and instructors using no-cost or low-cost course materials. We hope to achieve this while also ensuring that faculty and instructors have academic freedom, technological support, and advanced notice they require to select course materials that are high-quality, relevant, culturally responsive, and accessible in a no/low cost model.

Smart Goals for Increasing Textbook Affordability

SMART goals are a well-established tool to plan a project and provide a clear direction. SMART is an acronym that stands for specific, measurable, achievable, realistic and time-based.

SMART Goal #1: By the beginning of Fall 2021 term, the Open Access Librarian will convene an Advisory Group to guide the Textbook Affordability Plan.

SMART Goal #2: By the end of Fall 2021 term, the Advisory Group will add a student representative and finalize the Textbook Affordability Plan with an overall vision, a list of target goals, and steps for implementation over the next 3 years.

SMART Goal #3: By the end of Winter 2022 term, the Open Access & Government Librarian will begin using the SOU assessment software, *Improve*, to track SOU OER initiatives.

SMART Goal #4: By the end of Winter 2022 term, SOU will have a system in place to accurately track the number of courses, course sections, and enrollment using no-cost/low-cost course materials per term to report to Open Oregon.

SMART Goal #5: By the end of Spring 2022 term, the OER Advisory Group will educate 100% of faculty and instructors about the system to notate a course section as no-cost or low-cost.

SMART Goal #6: By the start of Fall 2022 term, the Advisory Group will determine a process for 100% faculty and instructors to be informed about available low-cost and no-cost course materials. Outreach to Divisions, support units, and other stakeholders will be conducted on a regular basis, such as presentations at faculty meetings, Faculty Senate, email messages, and information shared via institutional media outlets.

SMART Goal #7: By the start of Fall 2022 term, SOU will incorporate information into student orientation materials regarding no-cost/ low-cost designations. This information will be provided through multiple virtual and in-person methods such as orientation and advising appointments.

SMART Goal #8: By the end of Summer 2023 term, the Open Access Librarian will hold OER informational sessions or workshops for faculty presented at least twice per year.

SMART Goal #9: By the end of Fall 2024 term, the Advisory Group will investigate internal funding opportunities to provide faculty OER adoption stipends from the Provost's office, ASSOU, and the Alumni Foundation.

SMART Goal #10: By the end of Fall 2024, of the courses which require course materials, 25% of them will be using no-cost or low-cost open educational resources.

Timeline

This Textbook Affordability Plan is intended to be completed over a three year period beginning with Fall 2021 and ending with Fall 2024. The expectation is that the plan will be continually evaluated and adjusted over this three year period as needed. In addition, a new plan will be created following the completion of this initial plan.

Support for Academic Freedom

SOU faculty and instructors have academic freedom to select high-quality course materials for their courses. In particular, individual instructors have the academic freedom to center affordability, accessibility, and equity when selecting course materials.

In the [Collective Bargaining Agreement between Association of Professors, Southern Oregon University and Southern Oregon University](#), September 1, 2018 through August 31, 2021, Article 1. Preamble, Section C states:

The teacher is entitled to freedom in the classroom in discussing the subject of the course and debating the subject of their courses or contemporaneous topics that may impact the subject or methods of their courses, as well they are entitled to the selection of course materials, and to promote activities that encourage the broadening of student inquiry and investigation into areas and topics related to their courses. Faculty have the concurrent responsibility to refrain from introducing topics or

materials that are in no sense, broad or narrow, germane to their course objectives, disciplinary methods, or course content.

SOU faculty and instructors recognize the economic reality of students, and faculty have an additional responsibility to seek and consider affordable textbooks for our students. Using OER allow greater access to higher education, improve student retention, and [increase student success](#), especially in under-served student populations.

Process for Faculty and Instructors to be Informed about Available Low-Cost and No-Cost Course Materials

Targeted outreach will be conducted to all stakeholders on campus including students, staff, faculty, bookstore staff, Center for the Advancement of Teaching and Learning (CATL) faculty, IT staff, University Administration, alumni, potential students, and community members. The Open Access Librarian created an [OER Guide](#) available on the library's website. Informational sessions, workshops, and one-on-one consultations to assist faculty with OER will be available from the Open Access Librarian. CATL Faculty are also available to assist faculty and instructors in course redesign and universal design for learning.

The Advisory Group will consider the impact on CATL faculty's time to assist in course redesign, as well as on the Open Access Librarian's time to assist faculty in searching for and adopting OER. Faculty will be encouraged in the [OER Guide](#) to check out the Open Oregon Resources Page, Open Textbook Library, OER Commons, and other collections of quality OER.

Specific pitches and talking points on the benefits of OER will be developed regarding stakeholders, such as faculty, administrators, students, and bookstore employees.

SWOT Analysis

It is important for the OER Advisory Group to conduct a SWOT analysis (strengths, weaknesses, opportunities, and threats) to help us see the big picture and brainstorm solutions to challenges. This will help us better understand our internal and external factors that may affect our success. The SWOT analysis can assist us in building on strengths and taking advantage of opportunities.

Internal	
<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> · Open Access & Government Information Librarian to coordinate OER initiatives · OER Advisory Group with members representing the library, faculty, bookstore, and academic scheduling · Interim University Librarian, Librarians, students, and Provost support OER initiatives · Several faculty are already using OER in their courses · Several faculty have received Open Oregon funding opportunities on OER · Criminal Justice Department faculty worked together creating a course textbook · SOU Strategic Direction I, Goal 3 and Strategic Direction IV, Goal 2 directly relate to OER efforts · SOU Disability Resources supports accessibility for course materials 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> · Not all instructors aware of OER so there is a need for more education and promotion · The myth that all OER are low quality and not peer-reviewed · Faculty feeling overwhelmed with responsibilities and lack of time to commit to adopting OER and course redesign · CATL faculty support OER efforts, but did not express interest in serving on Advisory Council due to other responsibilities · No specific SOU budget for OER initiatives such as faculty stipends, faculty workshops, and promotion · Library Marketing Assistant position is currently vacant and this person would help conduct OER outreach and promotion
External	
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> · Open Oregon Educational Resources is a statewide program promoting OER with funding opportunities and statewide mandates for OER data reporting · Statewide OER Coordinator for higher education in Oregon, Amy Hofer, shares her expertise and guidance from other higher education institutions in Oregon 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> · Time involved for faculty to adopt OER · The COVID pandemic has created overwhelming stress and some faculty don't want to add any additional items to their workload because of COVID stress · Not all subject areas have quality OER · Lack of extensive test banks and other

<ul style="list-style-type: none"> · Oregon House Bills 2871, 2213, and 2919 promote the use of OER and more transparency in the cost of higher education courses · More classes are offered remotely which lends itself to electronic OER · Potential for funding from the Provost's Office and/or the Alumni Foundation for faculty stipends to adopt OER and other OER activities · Many quality collections of OER continue to grow, adding new OER and ancillary materials to online collections, which our faculty can take advantage of for course materials 	<p>ancillary materials for OER that faculty desire</p> <ul style="list-style-type: none"> · Accessibility issues for some OER, i.e., that the electronic textbook can be read by a screen reader with optical character recognition software · Potential for budget cuts to higher education in Oregon and SOU leading to low morale and less time for faculty to devote to adopting OER and course redesign
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Targets for Student Savings

To determine student cost savings per term, we need to know the following:

- Fourth week headcount enrollment for each term
- Number of designated sections using no-cost/ low-cost materials
- Number of students in designated sections using no-cost/ low-cost materials

We will use \$100 as the textbook cost per student per section to calculate student savings. Many institutions across Oregon are using \$100 as the average cost of a textbook to calculate savings as a result of OER adoptions. A 2017 blogpost from Amy Hofer of Open Oregon titled [Is the Average Cost of a Textbook \\$100?](#) explains how \$100 is a fair estimate.

Textbook Savings

Is the cost of a textbook based on the price of a new or used copy?

The cost is based on a new copy of the textbook. In many circumstances, a used textbook copy is not available to students. Students who receive financial aid or Veterans' benefits often buy their textbooks from the campus bookstore so that they do not have to pay for textbooks out-of-pocket and wait for a reimbursement. Using the bookstore price to determine the cost of the textbook will standardize the process. In

addition, using the price for a new copy of the textbook will allow us to report the maximum cost savings for students.

What if the same textbook is used across multiple terms for sequential courses?

If a textbook is used across multiple terms for sequential courses, it is still important to assign attributes based on the full textbook price each term. Since many of our students may receive overrides or test scores that allow them to bypass courses in a sequence, it is important to be clear how much the textbook costs if a student is coming into a sequence midway through. However, if faculty make a note about the material being required over multiple terms when they give the bookstore adoption information, the bookstore team will clearly post that information for students to see. That way, students in the full sequence of courses will know to keep the materials, as well as be reminded that they do not need to purchase those materials again.

Is having no class materials required considered the same as using OER?

No, it is not considered the same, because we want to distinguish between courses which have no materials required and courses that are using no-cost or low-cost materials. This will allow us to collect and report accurate student cost savings related to OER efforts on campus.

Data Reporting to the Oregon Higher Education Coordinating Commission (HECC)

We are required to report the following data to the Oregon Higher Education Coordinating Commission (HECC):

- Academic term
- Number of designated sections as no-cost or low-cost
- Number of students in those designated sections (fourth week headcount)
- Estimated savings
- Total sections offered
- Percent of sections that are no cost/ low-cost

We do not have an accurate baseline on how many sections are using no-cost/ low-cost materials currently. Therefore, it is important to get that information before we determine our target for student savings.

Measures of Success

This list represents the type of data SOU will need to gather to measure growth towards our goals:

- Student savings
- Number of students impacted
- Number of courses (sections) using affordable learning materials
- Number of sections designated low-cost
- Number of sections designated no-cost
- Enrollment numbers for each section
- Total number of reporting faculty/ Total number of sections
- Faculty Engagement
 - Faculty expressing interest in affordable learning materials
 - Faculty reviews of OER textbooks
 - Number of OER adapted, adopted and/or authored
 - Instructor satisfaction with quality, inclusivity, and effectiveness of affordable learning materials
 - Inquiries from faculty on OER
 - Number of workshops offered to faculty
 - Workshop attendance

Alignment with SOU Campus Strategic Directions

The following SOU Strategic Direction goals in bold are examples of goals which overlap with OER and textbook affordability initiatives.

Strategic Direction I: SOU will transform its [pedagogy](#) and curriculum (how and what it teaches) to enhance the success of its learners and graduates.

- Goal One: SOU will develop curriculum and provide learning experiences that prepare all learners for life and work in an evolving future; connect directly with the challenges of our community, region, and world; and build self-confidence and the capacity to think critically, innovate boldly, and create lives of purpose.
- Goal Two: SOU will align faculty hiring, promotion and tenure policies, and allocation of other academic resources with the university's mission, vision and strategic plan.
- **Goal Three: SOU will develop and utilize resources to ensure affordability of and access to student learning opportunities.**
- Goal Four: SOU will engage in ongoing assessment of academic and academic support programs in order to further a process of continuous improvement.

Strategic Direction IV: SOU will create a diverse, equitable, inclusive community where learners flourish.

- Goal One: SOU will replace structural and systemic barriers with equitable processes and practices that promote a sense of belonging and ensure the success of a diverse “new majority.”
- **Goal Two: SOU will establish supportive pathways that will increase the access, retention, and success of learners (students, faculty, and staff) from underrepresented backgrounds.**
- Goal Three: SOU will prepare all learners regardless of background, identity and position, to work, live, and communicate effectively across differences in order to thrive in an increasingly diverse world.

The OER Advisory Group feels that the Strategic Direction goals align closely with using OER in a wide variety of courses.

Economic Impact on Bookstore Revenue

The SOU bookstore is operated by Barnes and Noble College (BNC). BNC offers programs which aim to accommodate and promote the low cost/OER initiative on campus. Two of the programs that BNC offers are BNC OER+ and First Day. The OER Advisory Group is, and will continue to work closely with the bookstore to identify OER resources, programs, and low-cost alternatives that can be made available to students through the bookstore. The cornerstone in successfully mitigating the financial impact to the campus bookstore is communication. Communication between the bookstore, campus, and faculty members regarding the use, or absence, of course related materials must be timely and free flowing, not only for the sake of the bookstore, but more importantly for our students. Additionally, the flow of information and understanding of the current OER initiative is critical to successfully launching and maintaining a successful low-cost/ OER culture on campus. The bookstore will continue to work closely with the OER Advisory Group towards the goal of constructing, promoting, and maintaining a sustainable model that aims to benefit all parties.

Sustainability

The OER Advisory Group will review and revise the Textbook Affordability Plan on a regular basis as technologies, resources, and budgets change to ensure sustained progress. In addition, we will continue to monitor our efforts with the biannual HECC reporting requirements. The Open Access & Government Librarian will use the SOU assessment software, *Improve*, to track SOU OER initiatives.

The Open Access & Government Documents Librarian will continue to provide education and professional development for faculty and instructors to promote and support OER efforts and adoption. In addition, the Open Access & Government Documents Librarian and the University Librarian will offer suggestions to Academic Divisions on how to address the role of OER in their tenure and promotion requirements including how OER are evaluated in the tenure and promotion process.

For the OER Advisory Group to be effective, there needs to be consistent messages from the Provost and Faculty Senate that the Textbook Affordability Plan is a priority, as well as Administration offering support and enforcement for OER initiatives.

References

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