

Textbook Affordability Conference at Sheraton Marina, San Diego, February 12-13, 2015

Opening Session 1: Ryan Petersen, CEO of Verba Software

- Bookstore and textbook company opening session about budget needs.
- Tuition and textbook costs are outrageous. 812% increase in 30 years.
- \$8,660 average cost for education at a four-year university.
- \$1,764 average in the CSU per year.
- Conflicting data on this is due to various means of achieving the resources, today.
- We can do better to help our students.
- Course average is about \$150. Vary depending on discipline.
- Starting with the bookstores we will look at the costs involved; libraries; OER organizers; faculty members; publishers; government policy.
- Please give generous honest feedback.

Make Textbooks Affordable

- **Jason Lorgan:** UC Davis Bookstores (23 years in business)
- **Chris Tabor:** Queens University, Canada
- **Chuck Kissel:** CSU Fullerton (Assoc. Ex Director)
- **Pricing Transparency:** list prices of book from publisher to Amazon, to digital, etc.
- Public domain content
- **Market Transparency:** audience change. Targeted the faculty.
- In the old days bookstore held information secretively, confidentially. Fullerton put the ISBN numbers online openly, they found that students could shop better and see the competition of all options: new, used, rental, oer options. Next work with the faculty, and let students have a voice to rate the options.
- Student Affairs runs the bookstores at UC Davis. Blue and Gold plan. No tuition if family makes under \$80,000. They pay fees but no Tuition. State of CA is going this way. Price comparisons since 2010 at UC Davis. Ability for students to order their choice online from the UC Davis website. No derogatory articles in the student newspaper since this took place. Almost 50% less transaction price, but more transactions overall.
- **Occular heuristics:** Eyeball the various costs of same source... ha, ha.
- **Rental:** Hard to begin this process at first. Rent almost 75% of all titles of books as rentals, now, at CSU Fullerton. UC Davis says new can be rented for 54% of new textbook, or 75% of used textbook. How are rentals handled? We don't get them all back about 10% don't come back, then a penalty is charged. Follet stores don't do rentals? In Canada don't have used-book distributions.
- **Digital: Inclusive access.** International corporation in Canada. Static PDFs or eBooks allowed them to participate, but access to dynamic content, websites, is problematic. Superior model. Migration or transition is dangerous. Since 1997 they have been using OER materials. Its a hybrid solution, textbook tethered to an OER. Buy digital code online and never set foot in a bookstore. 92% came into store to buy it. Digital access still fearfull, to students: what if they don't have digital access? for whatever reason? Davis guy sat on Taskforce for Digital Liscensing. Course fee model examined. Inclusive Access Model. rather that F (fee) word. Like the issue of Lab Fees. If he could get around getting it Mandatory, it could work. Adaptive content first with three

Publishers: Cengage, McGraw Hill and Peterson. Loaded the content into the LMS. It worked best due to Portal IDs have to be used for gradebook. Pilot program, free for first two weeks. If students opted to keep it in, no charge except through student account. Successful. Products less than \$100. Student survey 35% return rate - that this was a good way to do it. Fall hope for 100 courses to be in this system.

- **Q & A: Faculty don't understand what OER is.** Need to get faculty more educated about this. Not resistance as much as ignorance about its availability. Is OER important to Distance Learning or Hybrid? Discoverability is biggest issue. Good student experience yet to be proved. Many restrictions on keeping digital content beyond class life or how many pages can be printed. Read a white paper on Distribution of Digital Content (?) Don't operate in Silos, but work together like represented in this conference audience. *Work together with the professors to make it more affordable.*

Notes to self: Northridge doing iPad initiative - talk with Susan Wilson, San Marcos, too, about Softchalk and ALS. Talk with Indiana's, Heather; and Leslie Kennedy about SoftChalk licenses in conjunction with TAP for us and AL\$ for CSU.

LIBRARY SESSION: Checking out Over-Due Affordability, Libraries and Required Course Materials

CALMing the cost of textbooks: How to create ALS materials on your campus (San Marcos).

- Spring 2013 started, Dean, faculty fellow, 3 ITCs.
- Developed a team: conversation with faculty, proposal to Academic Senate.
- Seed money: grants; Bookstore; open access policy (working on it)
- Colleges/departments: custom presentations
- Met with Associated Students
- Accessibility, Library, partner with their Bookstore, Moodle
- Author's Rights . CSU broke the big deal with Wiley.... ??
- 40 courses have been CALMed.
- Saved over 400K\$ in textbook costs.
- **Carmen Matchell**, Institutional Repository Librarian, cmitchell@csusm.edu and Twitter: [@carmendarlene](https://twitter.com/carmendarlene)
- Grant money to faculty to work on course redesign.

Cheryl Stewart: Librarian, Coastline Community College Working Towards Low-Cost High Quality Textbooks

- Started the school without a library at first.
- **CA OER Council: CSU + UC + CCC.** Cheryl sits on the council.
- Deterrents to Adopting OER listed.
- Legislature gave money to select: 50 top undergraduate courses large enrollment, to administer rigorous review process; promote production, access and use; Solicit input from student associations; RFP to create OER materials; identify available free and open etextbooks.
- CSU system to be oversight group: **Gerry Hanley.**
- **Hewlett Foundation and The Gates Foundation funding sources.**
- *[She moved too fast through slides and confusing organization of presentation.]*
- Creative Commons License.

Dawn Setzer, Dir. of Communications, UCLA Library, dsetzer@library.ucla.edu

- Affordable Course Materials Initiative Pilot at UCLA.
- Custom Course Readers were expensive to students.
- Charging licensing fees that were already paid by the library.
- Other solutions: ALS and UMASS Amherst Project.
- CDL (CA Digital Library) to UCLA.
- Library wanted to save money but also collect the appropriate materials for their faculty/students uses.
- Matching funds and senate approval.
- Joint Committee between library and faculty for review process in applications.
- Award recipients got HELP: cash gift of \$1,000, if over 100 students, more money. Transferred funds to the Department. In addition to money, they got support.
- Library gets more exposure to students and coursework.
- Students save money and appreciate course materials in a new way.
- *[CAN'T read the slides contrast of white letters over light green... Not accessible.]*
- \$116 savings per student...?
- What's Next? expand program across more courses.
- www.library.ucla.edu/support/support-instructors/affordable-course-materials-initiative.

OpenSTAX College is a non-profit organization committed to improving student access to quality learning materials.

- David Harris, Editor-in-Chief, <http://www.openstaxcollege.org>

- **The Priority is Learning.**
- Supply and Demand considerations.
- ***It takes a village of entrepreneurs.***
- Call to Action.
- Non-profit organization, sponsored by foundations like Gates, etc.
- Creative Commons licenses.
- Attribution, No Derivative Works, Share Alike, Non-Commercial
- OpenSTAX uses the most liberal-use license.
- OER 1.0 vs. OER 2.0 (current).
- Better now than it was. And peer-reviewed now.
- Partner with Wiley & Sons.
- Introduction to Psychology from Cananda, UBC is free.
- Anatomy and Physiology book, interactive Link is free, from UMASS
- Green lanyarn represent the free books in oer.
- Adoptions are growing quickly.
- 1200+ adoptions, 875 schools, and student savings >\$30 million
- Time to act is now, as the Need is Great.
- Student indebtedness is higher than ever.
- Ecosystem requires a sustainable system.
- Demand Considerations: small team of A+ players can run circles around more level B an C players.
- **Dr. Richard Baraniuk**, Rice University OpenSTAX.
- **Dr. Gerry Hanley**, Asst. Vice Chancellor, CSU since 1997 MERLOT.
- **Dr. Cyril Oberlander**, Dean of Library at Humboldt, pioneer of Open SUNY.

- **Kim Thanos**, co-Founder of Lumen Learning.
- **Mary Burgess**, Acting Executive Director, BC Campus. Nearly 1 million \$ savings.
- Univer. Systems of Georgia. Dr. Houston Davis; Lauren Fancher, Jeff Gallant are institutionalizing OER, saving \$9.18 million
- Best Practices: Show Support, Train, Testimonials, Incentivize, Try it, Structure.
- **Look for video identifying success in Biology at Univ. Georgia System.*
- More efficacy data is forthcoming to prove to faculty this is a win-win.
- Evaluate OER for adoption.
- Recommend OER to a colleague.
- Set up an OER program.
- Reach out to OER producers.
- Collaborate with your libraries.
- Leverage social media, to share, publicize.

Closing the Deal on Open: Incorporating OER Adoption into Your Strategic Plan

- **David Harris**, Editor in Chief, OpenSTAX College
- **Gerry Hanley**, Ex. Dir., MERLOT, Asst. Vice Chancellor, ATEC Services, CSU
- **Heather Rayl**, Emerging Technologies Librarian, Indiana State University.

I asked her to share her Bb Learn course for training her faculty in this process.

- ***Change our beauracracy to recognize this work.***
- It is redesigning your course to adopt OER. Not just changing a text book.
- LMS piece is essential for success.
- Faculty need help in learning what and how to change things.
- Developed a self-study course for faculty to know what they are getting themselves into. Also takes them through CC. 3-5 modules area about finding OERs, with realignment of LO. Re-organizing materials in the LMS.
- My question about RTP for Faculty: Issues around policy for Faculty Senate is essential. In the CSU you celebrate the saving of students money, and give awards and recognize faculty with the Provost, to show the value. Conversation has to move beyond the library and book store for leadership to take to the Academic Side of the house.
- The beauracracy should not make roadblocks for students saving money. Put that into the conversation. This is a mission of the university.
- e-Portfolios are helpful for this purpose.
- **See the CSU website.*
- *Washington State has modules, too, like Heather does to share about OER process for faculty.*

Fundraising for Affordability: Well, Somebody's Got to Pay for It

- **Lauren Fancher**, Galileo Support Services, Affordable Learning Georgia
- **Marilyn Moody**, Dean, University Library, Portland State University
- **Jeff Galant**, OER for ALG
- **Gerry Hanley**, CSU

- **Lauren**: Affordable Learning Georgia, (ALF): Galileo is Virtual Library in Georgia.
- RPG = Retention, Progression, Graduation.
- One stop service to find materials.
- Affordability CHOICE Accessibility.

- New roles for libraries, Campus champions, Voice to/from Campuses.
- Shared support of infrastructure.
- Webinars, newsletter, success story videos, presentations at Conferences.
- **Verba software** for comparison shopping, adoptions, marketplace for 11 campus operated stores.
- Mapping for ease of finding resources.
- eCore (ten courses no-cost, OER) serves about 12K students a year right now.
- **Marilyn Moody:** Reducing Student costs
- Portland State University: top down really works well for them Provost support.
- Student retention and graduation.
- Students are central and faculty, too.
- Librarians have relationships with faculty and students, too. Include them.
- Donars
- Disability Resources Center; Career Center.
- Access and affordability are the linchpins of the states ambitious goals.
- Students are at the center of what we are doing.
- **Gerry Hanley:** Getting funding without selling your soul; leveraging libraries.
- Libraries create an equitable future for Students, Faculty, and Community.
- Learning spaces, too.
- AL\$ Initiative Strategy
 - Enabling Ecosystems, Developing Demand, Creating Capabilities, Leveraging Content Providers
 - Top down allows permissioning trickle down. Then, work on business model.
- Fulfill our mission with Evidence. We need this research/data to support success.

Teaching Truth to Power: Faculty Work in Lowering Course Costs

- **Kim Mazyck**, Publishing Manager, Montezuma Publishing, San Diego State University

- **David A. Stout**, Asst. Prof., Dept. of Mechanical & Aerospace Engineering, CSU Long Beach

- **Katherine D. Harris**, Asss. Prof. Dept. of English, San Jose State University, and Project Manager for CA OER

- **Kim:** License for NO commercial use, is able to be printed for low cost
- Contact author for permission.
- What about taking OER and turning them into online resource?
- **David:** Who's in charge? Bookstore is an important team member.
- We view our end product differently.
- Faculty need to publish, do research, not just teach. End product is the student.
- We all need to think of the student's perspective.
- See eye-to-eye - faculty and publishers.
- Student's are priority number 1 overall.
- Not all books are alike and often what is good is minimal in one book, and another book. But can't piece meal together books chapters. Darn.
- Publishers are not trying to replace faculty. Realize that, too.
- Relationships ar important between them. Trust, time, intensity, reciprocity.

- Trust publishers to produce a good product.
- Give of your time to build a relationship.
- Allow publisher to talk to the students. Let them see how you teach and how you use their book. Helps them see.
- Commit to the cause.
- Give a little to get a little.
- Example: Dynamics class.
- Piloted example. Reduced the price 15% of textbook, but students had input and they committed to purchase the book because of their involvement.
- If publisher isn't willing to participate to reduce costs and work with students, no, not buying their book.
- What is needed is faculty to step out of their comfort zone, risk to put tenure on the line to help your students.
- **Katherine:** she does have tenure. Tweeting today. She will share about bureaucracy. Increase faculty adoption of high quality, affordable, or free course materials. She is the chair of the council.
- Awareness of OER. Many faculty think they are MOOCs.
- No comprehensive catalog of OER.
- No proven efficacy.
- Some sort of authority, a Peer Review process.
- Council charge is to improve materials and share within CSU, UC, CCC.
- Nine people are on the Council to make these decisions.
- Ruth Guzley is on the Council from the CSU.
- 50 courses across the three systems were selected.
- Creative Commons needed for remixing of the content across the three systems.
- Created the Peer Review Process. Created one using Google Forms.
- One panelist from each of three segments.
- **Cool 4 Ed** website & Facebook site.
- See it for evaluation rubric and comments.
- Review due to legislature by Jan. 2016.
- OER has a PR problem.
- Data is needed. Council needs campuses to pick this up.
- CCC faculty do not have RTP for incentive. Due this out of hide.
- Takes a lot of time to peer review this.
- <http://www.icas-ca.org/coerc>
- Facebook for exposure
- *Talk to Cheryl A. about this.
- Best collaborative group she has ever worked on.
- Good Faith Campus OER Guidelines (?)
- Get a copy of the Master Slide deck.

Publishers: Architects of Content: Building More Affordable Models on Course Materials

- **Tom Malek**, VP Channel Relations, Pearson
- **Nikolas Osborn**, VP of Strategic Partnerships, McGraw Hill Education
- **Lisa Culhane**, Director of Program and Channel Development, Learning Solutions, Wiley

- **Wiley: Lisa Culhane**

- Student Readiness
 - Learning Experience
 - Learning Outcomes
- Wiley PLUS Learning Space
- BIO Principles and Bio Concepts turned into OpenSTAX for cost to students of \$50.
- OER & Wiley, greater benefit for all.
- WileyPLUS Solutions include Band Pricing; digital offerings
- Wiley wants to work with the academics on the students NEEDS.
- Work with individual instructors, departments.

- **McGraw-Hill Education: Nik Osborn**

- Affordability and Success
- Cost of education is rising. We all have it.
- Only 2.9 % of high school seniors graduate from college today.
- Image of tree with huge roots underground.
- Textbooks are too expensive or inflation. Business model, or economic model.
- Align Technology with Content and Pedagogy
- How do we measure success?
- Unified platforms?
- Seamless access to desired content?
- More affordable solutions?
- Fwy crossing over all over image. But, no traffic.
- Partnerships that deliver success...
- Indiana University (IU) Model developed in 2011.
- Defined partnership with publishers
- Unified eBoom platform
- Informed student fee
- Admin support (high level)
- First day of class access
- Focus on affordability, mobility and content selection.
- Has grown to 16 K students and 600 sections per semester.
- Talk with *Heather* again.

- **Pearson: Tom Malek**

- No slides.
- Heisman trophy with a circle and a slash through it.
- Unblock ourselves.
- Long term vision around efficacy.
- Relation to outcomes.
 - Affordability
 - Accessibility
 - Achievement
- We won't be successful alone, but together.
- Leverage our strengths.
- Indiana pulled it off that way.
- Use the bookstore to align us collectively
- Technology, OER, libraries, we all have a role.
- Manage the transaction.

- Middleware, too. He identifies it as PeopleSoft
- Fulfilment partner
- Different platforms make it hard.
- eReader common to all.
- Efficacy: deliver results. Pearson has that reputation.
- Digital over paper; commerce; flexible platform.
- Five years in, he wants to work with the bookstore.
- What about the LMS? No...
- Follett, they are working with.

Q & A

- Surveys tell us students do not like digital, so what next? Bookstore asks.
- New evolution eBook 3?
- Better accessibility next?
- Rebel technology? -Pearson
- What happens with assessment, for instant feedback?
- **IU model, look at that.**

Friday Breakfast with Leslie and Gerry from CSU Chancellor's Office

Leslie Kennedy has OpenSTAX books to share and have digital copies for free to show around by departments Sociology, Pysch, Economics, Statistics, Biology, Anatomy, Physiology, Physics, etc. Digital books and/or print out. *Discussion with Heather from Indiana, too.*

Friday 10:30am Government Speakers: It takes a village. New Public Policy on the Cost of Higher Education.

- Dean Florez, senate majority leader & CA HE Innovation Awards

- What drives government? Crisis + bad press = Action
- Textbook exceeds rate of inflation
- What we used to call Textbooks
 - Digital Transition: New Learning Companies
 - Mobile Transition
 - Subscription Model Driven (NetFlix)
 - Libraries go full circle
 - Amazon Bookstore
 - Rise of OER
 - Adaptive Competency based on LMS
- Keep your eye on OpenSTAX.
- The Gatekeeper? Tied to the status quo? books
- Seat time, class-time, lecture-based teaching will change
- Two worlds, one reality; early adopters, mainstream market
- What is coming? Focus on competencies
- Employers Role in validated skill sets
- Credentials compete with Degrees
- Credit for Actual Learning, not time in class

- Flexible Option at Wisconsin System and Kentucky "learn on demand"
- Pennsylvania Community Colleges: College credit, fast track program
- Things are starting to change.
- Expanding Federal Aid for **CBE (competency-based education)**
- Governments new Ecosystem for Derision Making & Policy Implementation
- Higher Education Policy Shift:
 - *If the Plan doesn't work, Change the Plan not the GOAL.*
- Innovation Police: Government Can Help or Hurt - Watch out
- Obama wants two-years free cc education, but Open Textbooks free might be better?

- **John Valencia**, Partner, Wilke, Fleury, Hoffelt, Gould & Birney, LLP

- Gov. drives exchanges like these
- When we are not focused on a crisis, we have a culture of avoidance.
- Prices rise unchecked if people making the goods don't pay the prices.
- Case in point \$250 Economics textbook price...
- Supply and Demand makes prices rise just before the time of purchase for the next semester. Two decades this model is the same.
- 2004 encouraged transparency, only the stores (bookstores) responded.
- Required for differences in textbooks now, on the cover.
- CA Senate Bill 216 in 2007-08; publish books required ahead of class.
- CAOERC (council) deadlines met.
- Trying to bring up a new bill a core expense to bookstores, to reduce prices.

- **Richard Hershman**, VP of Government Relations, NACS

- Something radically wrong when students choose courses based on the cost of the textbooks. (Complaint read aloud was from Bruin paper in 1931. Sounded like today!)
- 500+ state bills have been introduced to lower prices.
- \$10's of millions in grants have supported OER at federal and state levels.
- Sales Tax in CA skimming 10% off books costs, and OER.
- Federal HE Reform.
- Affordability, accessibility, return on investments, etc. concerns.
- No good records kept on cost for students annually on materials.
- Downward trend seen in last 6 years on spending for materials.
- Students think: books vs food?
- Perception issues about required books or not.
- We need accurate data to measure improvements. Duh!
- Ideas: exempt textbooks from sales tax.
- Get rid of quarter terms.
- Improve high schools to reduce remedial enrollment.
- Visit Affordable Learning Solutions Community at:

Visit Affordable Learning Solutions Community at:

http://voices.merlot.org/groups/group/show?id=2093140%3AGroup%3A54239&yg_source=msg_mes_group

Notes taken by Laura Sederberg, CSU, Chico, lsederberg@csuchico.edu, www.csuchico.edu/cals/