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Reducing Student Costs: A Report on Textbooks and Course Materials

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Reducing Student Costs: A Report on Textbooks and Course Materials

FEBRUARY 26, 2015

“Reducing Student Costs: A Report on Textbooks and Course Materials” is a report to the Portland State University community. It was prepared by the Reduce Student Costs Task Force appointed by Bob Liebman, Presiding Officer, Portland State University Faculty Senate; Eric Noll, President of Associated Students of Portland State University (ASPSU); and Sona K. Andrews, Provost and Vice President for Academic Affairs (OAA).

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Task Force Charge

The cost of textbooks and other course materials is a major concern and financial barrier for students. The College Board estimates a 2013-14 cost of \$1207 for textbooks and supplies for the average undergraduate.¹ The Reduce Student Costs Task Force will review models and strategies and make recommendations for lowering course materials costs for PSU students.

One of the most effective strategies to reduce costs is the use of open textbooks and other open educational resources. The Task Force should investigate initiatives in other institutions and recommend ways to create, host, and/or provide access to more open and low-cost textbooks and course materials for our students. The Task Force should also recommend ways to facilitate faculty in identifying and using online library resources and open access resources more effectively.

Questions to be addressed by the Task Force include but are not limited to:

1. What role can open and low-cost textbooks play in reducing student costs?
2. What textbook adoption strategies and policies can be used to reduce student costs?
3. How can access to more open and low-cost textbooks and course materials for PSU students be facilitated? What are the technical and policy barriers?
4. How can pilot projects or projects already in place at PSU (such as the PDX Open project) contribute to this initiative?
5. In what ways might PSU collaborate with external partners including other Oregon universities?

Task Force Members

Chair	Marilyn K. Moody, Dean of the Library
3 students appointed by ASPSU	Shadi Alkhaledi Chelsey Weinmann Kathleen M. Steppe
3 members appointed by the Faculty Senate	Jill Emery (Library) Kimberly Pendell (Library) Joel Bettridge (English)
2 members appointed by the Library	Karen Bjork (Library) Emily Ford (Library)
1 member appointed by the Office of Academic Innovation	Vince Schreck
3 members appointed from the campus community by the Provost	Berrin Erdogan (School of Business Administration) Gerardo Lafferriere (Mathematics) Ralf Widenhorn (Physics)

¹ The College Board (2013), Trends in College Pricing. p. 11, figure 1. Retrieved from <http://trends.collegeboard.org/sites/default/files/college-pricing-2013-full-report-140108.pdf>

Executive Summary

In this report, the Reduce Student Costs Task Force outlines recommendations and strategies for PSU to consider in an attempt to reduce student costs for textbooks and course materials. The Task Force presents the recommendations and strategies under five overarching themes, listed below.

Theme 1: Expand on the initial investment of the Task Force

The current Task Force quickly realized in their initial meetings that, in order to be successful, more time would be needed to fully investigate all of the issues surrounding the costs of student course materials. Reducing student costs is a complex issue and requires a multifaceted approach in order to best address all the needs identified. The most immediate need is a full environmental scan of Portland State University that includes the perspectives of both students and faculty members in multiple disciplines. From this scan, the key areas needing ongoing financial support can be determined.

Recommendations:

1. In order to carry out work not possible in the limited time frame of the Task Force, and to help implement Task Force recommendations, a Working Group, including interested Task Force members, should continue the Task Force's work through the 2015-2016 academic year.
2. PSU should monitor and actively participate in the development of Higher Education Coordinating Commission (HECC) textbook affordability recommendations.
3. Seek external funding to reduce student costs for textbooks and course materials.

Theme 2: Pursue collaboration among all stakeholders

Stakeholder involvement in the discussion, development, and adoption of policies and procedures for reducing textbook and course materials costs is paramount to the success of any initiative moving forward. During Task Force conversations, it became clear that all potential stakeholders need to be brought to the same table to discuss initiatives to reduce student course materials costs. As such, entities in Oregon including but not limited to the state's Higher Education Coordinating Commission, local commercial entities, the PSU Library, the Office of Academic Innovation (OAI), as well as PSU faculty and students should be involved in all facets of course material cost reduction conversations and proposed strategies.

The recommendations included in this theme outline ways in which stakeholders can engage and meaningfully impact the reduction of student course material costs via coordinated alignment of other initiatives currently underway at PSU, the development of open educational resources, and seeking and engaging in external funding opportunities with partners within our region.

Recommendations:

4. Support faculty in utilizing and producing OERs.
5. Pursue collaborations for the development of open textbooks and OERs.

Theme 3: Develop and incentivize use of open education resources (OERs)²

Portland State University needs to make an investment in the in-house development of OERs. This investment includes time, financial incentives, and the development and implementation of policies on textbooks and course materials used by faculty. The Library can play a vital role in helping to develop OERs and assist in identifying substitutes for purchased texts where appropriate. Professional development and educational opportunities for students and faculty regarding the reduction of student course materials costs will become paramount in this effort.

Recommendations:

6. Enhance professional development and educational opportunities for faculty to encourage the use of library and OER resources.
7. Build on the pilot PDX Open reTHINK³ project to enable faculty to author and publish readily accessible textbooks.
8. Pilot a course or group of courses that do not require the purchase of textbooks and course materials by individual students.

Theme 4: Investigate other cost-reduction initiatives

Cost-reduction initiatives require more involvement beyond supplemental financial support for the development of OERs. These tactics can be achieved administratively through departmental management of classes that are taught by late-hire instructors, and developing and implementing policies and procedures that clearly delineate course material requirements for their discipline. Making a greater investment in the Library to support student resources and education on resources that can be used in place of course assignments could be made. Lastly, PSU can develop mechanisms for students to become better aware of more affordable options.

Recommendations:

9. Promote early adoption of textbooks and other course materials to allow students additional time to seek savings.
10. The Library should continue to support PSU's efforts to reduce student costs for textbooks and course materials.
11. Target high enrollment classes to maximize impact of initiatives.
12. Facilitate student-to-student textbook re-use through student-led initiatives.

² The United Nations Educational, Scientific, and Cultural Organization (UNESCO) defines open educational resources (OERs) as "any type of educational materials that are in the public domain or introduced with an open license. The nature of these open materials means that anyone can legally and freely copy, use, adapt and re-share them. OERs range from textbooks to curricula, syllabi, lecture notes, assignments, tests, projects, audio, video and animation." UNESCO Communication and Information Sector (2014). What are Open Educational Resources (OERs)? ¶ 1 Retrieved from <http://www.unesco.org/new/en/communication-and-information/access-to-knowledge/open-educational-resources/what-are-open-educational-resources-oers>

³ Portland State University launched reTHINK PSU in 2013. The goal of reTHINK is "[t]o deliver an education that serves more students with better outcomes, while containing costs through curricular innovation, community engagement and effective use of technology." reTHINK PSU (2014). Retrieved from <http://www.pdx.edu/academic-affairs/rethinkpsu>.

Theme 5: Address challenges of copyright and intellectual property

The Task Force strongly recommends that Portland State University undertake a review of its current copyright and intellectual property guidelines and policies. Faculty members' intellectual property rights and copyrights do not provide the latitude and incentives needed for the investment in the creation of OERs. For the Library and the OAI, the current copyright guidelines and policies hamper the ability of faculty and students to fully utilize readily available resources for their courses in an online environment.

Recommendations:

13. Revise the Portland State University copyright and intellectual property guidelines and policies.
14. PSU should appoint a copyright officer.

Introduction

The financial reality for today's college students is untenable. The cost of acquiring course materials adds further financial burden to students who are already finishing school with mounds of debt. As such, the Reduce Student Costs Task Force began investigations on what could be done at Portland State University to alleviate students' cost burdens for acquiring textbooks and course materials.

The Task Force convened in Fall 2014 and continued its work through Winter 2015. We reviewed existing reports discussing textbook affordability issues and open educational resources (OERs) including the 2014 Oregon Higher Education Coordinating Committee (HECC) report "[Adopting Best Practices for Textbook Affordability](#)," sought out and participated in educational opportunities about OERs, and hosted an information session with Lumen Learning, a local company focused on OERs. We met with various PSU community members who have contributed to state-level discussions around course materials affordability and reducing students' costs. The Task Force members participated in regional and statewide forums on textbook affordability sponsored by the HECC and met with various representatives of the PSU Bookstore. The Task Force quickly discovered that universities have implemented a multitude of textbook and course material practices that result in students paying exponentially more for course materials. Therefore, a multi-pronged approach will be needed to address the reduction of student course materials costs.

The [Higher Education Opportunities Act](#) (HEOA) sets a number of requirements for campuses regarding practices around textbook access and adoption. One of the essential requirements is that institutions must, "disclose on the institution's internet course schedule and in a manner of the institution's choosing, the ISBN (International Standard Book Number) and retail price information of required and recommended textbooks and supplemental materials for each course listed in the institution's course schedule used for preregistration and registration purposes."⁴

A challenge for PSU is ensuring that textbook adoption policies are uniformly implemented across the campus. An ongoing concern is the ability for departments to meet bookstore deadlines for textbook orders. Students need to receive sufficient and timely information to allow them to obtain textbooks and other course materials before the first day of class and to make cost comparisons for various options, including purchasing used textbooks or obtaining rental copies of textbooks. The [Portland State University Bookstore](#) does provide the required price, ISBN, and textbook option information by course schedule.

In the remainder of this document the Task Force outlines its fourteen recommendations under five overarching themes:

1. Expand on the initial investment of the Task Force
2. Pursue collaboration among all stakeholders
3. Develop and incentivize use of OERs
4. Investigate other cost-reduction initiatives
5. Address challenges of copyright and intellectual property

⁴ H.R. Res. 4137, 110th Cong. (2008) (enacted). Higher Education Opportunity Act, §112(a), p. 31. Retrieved from http://frwebgate.access.gpo.gov/cgi-bin/getdoc.cgi?dbname=110_cong_public_laws&docid=f:publ315.110.pdf

Each theme lists recommendations and potential strategies PSU could use to address each recommendation. Moreover, the report contains three appendices providing contextual information regarding Oregon's current and previous work on the issue, examples of successful initiatives, and resources.

Student Impact

Kathleen M. Steppe finished her undergraduate degree at Portland State University in 2014 and is currently pursuing her graduate degree in PSU's Educational Leadership and Policy program. As a member of the Task Force, she passionately represents the financial challenges many students face.

"The dream of completing one's college education requires difficult choices be made. A quick search on the Internet provides one with notable insight referencing the cost of college-level textbooks has now increased over 800% since the late 1970s, so clearly and with all due respect, we passed referring to this as a crisis years ago. Tuition and related educational costs are ever-increasing, forcing many difficult decisions to be made regarding our priorities as students within higher education. Of course, college students are not isolated in the realm of difficult choices—we all have to make them. However, choosing between paying tuition or paying our rent/mortgage, buying text books or buying food should not be choices any college student has to make.

"Reassuring is the dedication of our Provost and like-minded professionals and student groups who do not shy away from addressing the very real impacts of these difficult decisions, we as college students are faced with. For our home of higher education to have envisioned a Taskforce aimed at welcoming inclusivity, where various stakeholders meet to discern options toward the common goal of reducing costs that we as students pay for our educational materials is inspiring."

In November 2014, HECC surveyed approximately 9,000 students from Oregon universities and community colleges regarding their use of textbooks. Approximately 39% of the students who participated were from PSU. Preliminary results indicate that 1/3 of the students do not acquire their books before the first day of class and 1/3 of the students need their financial aid distribution to pay for their books. Almost half of the students reported paying over \$250 per term for their books.⁵

⁵ Ayers-Preboski, L., Dense, J., & Lewelling, D. (2015). Textbook Affordability Student Survey Results. Higher Education Coordinating Commission Meeting, January 8. Retrieved from [http://education.oregon.gov/Documents/HECC/2015 Full Commission Meetings/01. January 8%2c 2015/5.0 Textbook Affordability Survey Results.pdf](http://education.oregon.gov/Documents/HECC/2015%20Full%20Commission%20Meetings/01_January%202015/5.0%20Textbook%20Affordability%20Survey%20Results.pdf)

Recommendations

Theme 1: Expand on the initial investment of the Task Force

The current Task Force quickly realized in their initial meetings that, in order to be successful, more time would be needed to fully investigate all of the issues surrounding the costs of student course materials. Reducing student costs is a complex issue and requires a multifaceted approach in order to best address all the needs identified. The most immediate need is a full environmental scan of Portland State University that includes the perspectives of both students and faculty members in multiple disciplines. From this scan, the key areas needing ongoing financial support can be determined.

Recommendation 1: In order to carry out work not possible in the limited time frame of the Task Force and to help implement Task Force recommendations, a Working Group, including interested Task Force members, should continue the Task Force's work through the 2015-2016 academic year.

Recommended Strategies:

- The Working Group should develop a web-based communication tool to share information and solicit input.
- The Working Group should conduct a textbook affordability environmental scan of PSU, including perspectives of students and faculty.
- OAA and ASPSU should provide a budget for FY16 for this Working Group to encourage pilot programs and provide incentives for faculty as described in the recommendations of this report.
- The Working Group should develop and propose an ongoing funding model for supporting reducing textbook and course materials costs.
- The Working Group should develop PSU budget priorities to support student costs reduction efforts. These priorities should include supporting faculty and student initiatives and Library services.
- The Working Group should investigate models that restructure student fees and tuition to cover needed course materials.

Recommendation 2: PSU should monitor and actively participate in the development of Higher Education Coordinating Commission (HECC) textbook affordability recommendations.

Recommended Strategies:

- The Working Group should review the report scheduled for release in April 2015 and make additional recommendations as needed.
- The Working Group should ensure that PSU considers the HECC's textbook affordability recommendations.

Recommendation 3: Seek external funding to reduce student costs for textbooks and course materials.

Recommended Strategies:

- Develop grant proposals to pursue outside funding to support course re-designs utilizing OERs.

- The Working Group should collaborate with the OAI, the Library, faculty, and ASPSU to develop proposals to submit through Sponsored Projects Administration.
- Develop proposals for donor and foundation support for textbook and course materials cost reduction in conjunction with the PSU Foundation.
- The Library Development officer and the Senior Director of Corporate & Foundation Relations should take the lead in working with the Library and other interested groups, including students, in developing proposals.

Theme 2: Pursue collaboration among all stakeholders

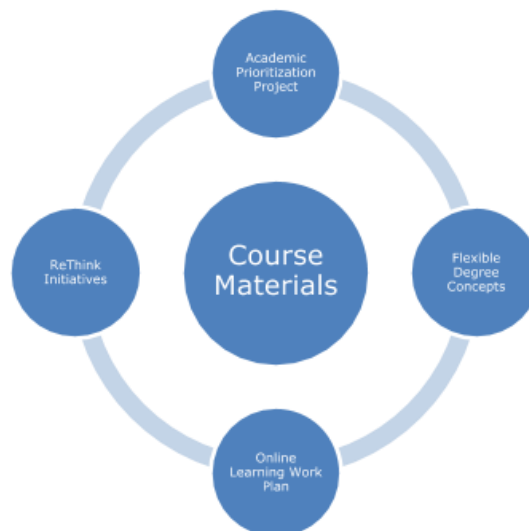
Stakeholder involvement in the discussion, development, and adoption of policies and procedures for reducing textbook and course materials costs is paramount to the success of any initiative moving forward. During Task Force conversations, it became clear that all potential stakeholders need to be brought to the same table to discuss initiatives to reduce student course materials costs. As such, entities in Oregon including but not limited to the state's Higher Education Coordinating Commission, local commercial entities, the PSU Library, the Office of Academic Innovation (OAI), as well as PSU faculty and students should be involved in all facets of course material cost reduction conversations and proposed strategies.

The recommendations included in this theme outline ways in which stakeholders can engage and meaningfully impact the reduction of student course material costs via coordinated alignment of other initiatives currently underway at PSU, the development of open educational resources, and seeking and engaging in external funding opportunities with partners within our region.

Recommendation 4: Support faculty in utilizing and producing OERs.

Recommended Strategies:

- Coordinate and align reTHINK PSU initiatives, Flexible Degree Concepts, the Online Learning Work Plan, and Academic Program Prioritization with efforts to reduce student textbooks and course materials costs.



- Develop incentives for faculty to expand the use and creation of OERs and open textbooks.

- As flexible degrees and courses are developed, funding from online fees should be used to develop OERs and open textbooks as appropriate.
- Course design and redesigns should consider the cost of textbooks and course materials as well as using OERs.

Recommendation 5: Pursue collaborations for the development of open textbooks and OERs.

Recommended Strategies:

- Propose and champion collaborative development of OERs through the PSU Library's participation in the [Orbis Cascade Alliance's Content Creation and Dissemination Team](#). The Library and its members on the Content Creation and Dissemination Team should take the lead in this initiative.
- Pursue partnerships with the University of Oregon and Oregon State University Libraries in the development of open textbooks.
- Approach Oregon State University and University of Oregon Libraries to start a collaborative OER project. Oregon State University has already developed the [Open Access Etextbooks Program](#) which, along with PSU's [PDX Open](#), provides a starting point.
- Investigate partnerships with other interested Oregon universities and colleges in developing and using OERs. In particular, the ongoing work of the Oregon Community Colleges in developing and using OERs may provide opportunities for collaboration.
- Work with the [Oregon Interinstitutional Faculty Senate](#) on textbook affordability issues in conjunction with their work with HECC.

Theme 3: Develop and incentivize use of OERs

Portland State University needs to make an investment in the in-house development of OERs. This investment includes time, financial incentives, and the development and implementation of policies on textbooks and course material used by faculty. The Library can play a vital role in helping to develop OERs and assist in identifying substitutes for purchased texts where appropriate. Professional development and educational opportunities for students and faculty regarding the reduction of student course materials costs will become paramount in this effort.

Recommendation 6: Enhance professional development and educational opportunities for faculty to encourage the use of library and OER resources.

Recommended Strategies:

- The OAI and the Library should collaborate to create and offer workshops and/or programs that focus on utilizing OERs in the classroom.
- Make new faculty aware of these opportunities at their orientations.

Recommendation 7: Build on the pilot PDX Open reTHINK project to enable faculty to author and publish readily accessible textbooks.

Recommended Strategies:

- Use PDXScholar to provide PSU faculty a stable, easily accessible and discoverable, permanent, online space via which to publish open textbooks for PSU courses.
- Expand open access textbook publishing using lessons learned from pilot projects to provide additional services. More than 200 students enrolled in these pilot courses and saved from \$100 to \$141 in one term for a total savings of \$23,805.⁶

Recommendation 8: Pilot a course or group of courses that do not require the purchase of textbooks and course materials by individual students.

Recommended Strategies:

- Investigate potential outside partners for supporting OER-based courses.
- Select pilot courses through a competitive proposal process implemented by the OAI.
- Investigate a textbook-free degree option.
- Encourage the adoption of [Open Textbook Library](#) textbooks by hosting faculty and staff workshops offered by the [Open Textbook Network](#).

Theme 4: Investigate other cost-reduction initiatives

Cost-reduction initiatives require more involvement beyond supplemental financial support for the development of OERs. These tactics can be achieved administratively through departmental management of classes that are taught by late-hire instructors and policies and procedures that clearly delineate course material requirements for their discipline. Making a greater investment in the Library to support student resources and education on resources that can be used in place of course assignments could be made. Lastly, PSU can develop mechanisms for students to become better aware of more affordable options.

Recommendation 9: Promote early adoption of textbooks and other course materials to allow students additional time to seek savings.

Recommended Strategies:

- Departments should adopt textbooks and course materials for courses where instructor assignments occur late in the process.
- Departments should develop policies and procedures to ensure textbooks are adopted in a timely manner. These policies and procedures should be shared with the Dean.

⁶ More detail in Appendix 1, p. 15, of this report.

Recommendation 10: The Library should continue to support PSU’s efforts to reduce student costs for textbooks and course materials.

Recommended Strategies:

- The Library should continue to provide and fund access to databases and journals that are suitable for use as course materials and/or for student research.
- Expand awareness of Library resources and services that reduce reliance on expensive textbooks and course materials across campus.
- The Library should regularly host or provide training, seminars, and webinars on research tools and methods.

Recommendation 11: Target high enrollment classes to maximize impact of initiatives.

Recommended Strategies:

- Analyze the 25 PSU largest enrollment undergraduate courses as possible targets and high priority for the development of OERs.
- Perform a cost study to determine the feasibility of putting on Library Course Reserve all textbooks for classes with the largest enrollments.
- Increase textbook availability in the Library Course Reserve by placing copies of textbooks in the Library’s Course Reserve for larger undergraduate courses.
- As stated in the Report on HB 4058 Textbook Affordability, investigate how textbook reserve programs provide students with access to course materials and how this program could be funded locally.

Recommendation 12: Facilitate student-to-student textbook re-use through student-led initiatives.

Recommended Strategies:

- Ask ASPSU to organize and implement a textbook swap event at the beginning of each term. PSU should offer ASPSU support.

Theme 5: Address challenges of copyright and intellectual property

The Task Force strongly recommends that Portland State University undertake a review of its current copyright and intellectual property guidelines and policies. Faculty members’ intellectual property rights and copyrights do not provide the latitude and incentives needed for the investment in the creation of OERs. For the Library and the OAI, the current copyright guidelines and policies hamper the ability of faculty and students to fully utilize readily available resources for their courses in an online environment.

Recommendation 13: Revise the Portland State University copyright and intellectual property guidelines and policies.

Recommended Strategies:

- Form a working group including representation from University Counsel, the Library, the Faculty Senate, the OAI, the OIT, and students to review and revise copyright policies and guidelines. This should be guided and informed by the purpose of copyright law.
- Working with University Counsel, University Administration, the Library, and Faculty Senate, create a copyright transfer agreement for OER materials from the University to the faculty and students who create the OERs.
- Re-evaluate the risk factors for the inclusion of commercial works into online course materials.
- Develop and implement policies regarding the use of textbooks and other course materials (both for-profit and open access) authored by PSU faculty.
- Adopt an interpretation of the TEACH Act to allow for streaming media use that cannot be readily attained through purchase.

Recommendation 14: PSU should appoint a copyright officer.

Recommended Strategies:

- Devote funding to appoint a Copyright Officer—a faculty position within the University Library—to bring expertise regarding copyright in higher education and libraries to assist in planning for any potential textbook affordability projects, as well as revision of University policies and guidelines.
- Support the Copyright Officer in developing and delivering copyright educational programs and outreach for faculty regarding Fair Use and other copyright and intellectual property issues.

Appendix 1: Oregon Initiatives

Portland State University Pilot Projects and Initiatives

The pilot project [PDX Open](#), funded by the Provost's Challenge as part of reTHINK PSU, resulted in the publication of five open access textbooks for the following courses:

- Japanese 399: Preadvanced Japanese
- Urban Studies Planning 531: GIS for Planners
- Special Education Department 510: Comprehensive Individualized Curriculum and Instructional Design
- Mathematics 311: Introduction to Mathematical Analysis I
- University Studies 231: Gender and Sexualities Sophomore Inquiry

This project reduced the number of textbooks participating students needed to purchase and has allowed the Library to lay the foundation to support open access textbook publishing.

PDX Open Textbook Title	Cost of Previously Required Textbook	Number of Students Enrolled in Course	Total Savings
Preadvanced Japanese (Fall 2014)	\$100.00	17	\$1,700.00
Spatial Thinking in Planning Practice: An Introduction to GIS (Winter 2015)	\$141.14	22	\$3,105.08
Comprehensive Individualized Curriculum and Instructional Design (Winter 2015)	\$135.00	60	\$8,100.00
Introduction to Mathematical Analysis (Winter 2015)	\$100.00	34	\$3,400.00
Gender and Sexualities: An Inquiry (Winter 2015)	\$100.00	75	\$7,500.00
Total			\$23,805.08

The Intensive English Language Program (IELP) is engaged in a project to evaluate the program's textbook policies and practices. Among the goals is reducing student costs and possibly moving more toward in-house authorship.

The PSU Bookstore continues to offer used textbooks and textbook rentals. Recently, the Bookstore experimented with matching online prices. In addition, the Bookstore has also discouraged the use of course packs by faculty since copyright clearance costs can be prohibitive to students. One major challenge currently faced with the PSU Bookstore is their tendency to under order required texts for classes as a cost savings measure. This practice has resulted in textbook shortages for many students.

Textbook Affordability Legislation and HECC Initiatives

In 2012, the Oregon Legislature passed House Bill 4058, which aimed “to examine and recommend adoption of strategies for making textbooks more affordable for students at all postsecondary institutions in this state.”⁷ In response to this bill, the Higher Education Coordinating Committee (HECC) appointed a Textbook Affordability Work Group, which issued a [2012 report on Textbook Affordability](#). In 2013-2014, the HECC once again considered textbook affordability issues. The June 2014 report, “[Adopting Best Practices for Textbook Affordability](#),” reviews the progress of the 2012 report’s recommendations. It also provides a summary of current practices at Oregon public universities.

Oregon State University Open Textbooks

The Oregon State University Libraries, OSU Press, and OSU Extended Campus have collaborated on an initiative to support faculty creating open textbooks. OSU has also participated in the [Open Textbook Library Initiative](#).

Oregon Community College Initiatives

In 2014, the Oregon Community College Distance Learning Association hired an Open Education Librarian as part of a project to work “closely with distance learning departments, libraries and academic departments at Oregon community colleges to develop services, programs, and processes that promote the dissemination of open educational resources.”⁸ This project takes advantage of the expertise of librarians with OER materials and copyright and intellectual property issues, as well as leveraging the strengths of a statewide approach to collaboration and innovation among Oregon community colleges.

The [Lane Community College OER Faculty Fellowship](#) provided support and opportunities for Lane Community College faculty to use OERs in their courses and save students money by reducing textbook requirements and increasing the number of textbook free courses. The fellowship ended in 2014. Lane Community College estimated that the OER Faculty Fellowship saved students \$124,950 per term, based on 49 courses converted with an \$85 average text price replaced at 30 students per course.⁹

Oregon Academic Libraries Course Reserves

Most Oregon college and university libraries provide course reserves for print and electronic resources, that often include textbooks, but usually not in a comprehensive way. In 2010 Portland Community College ran a grant funded project to place a copy of the required text for each course on reserve at one of their campuses.¹⁰

⁷ H.R. 4058-A (enrolled), 76th Leg. 2012 Oregon Laws, §1. Retrieved from <https://legiscan.com/OR/text/HB4058/id/595781>

⁸ (2014) Open Education Librarian job description. Retrieved from <http://occdla.wikispaces.com/file/view/OERjobdescriptionanddeliverablesfinaldraft%281%29.pdf>

⁹ Lane Community College (2014). “Student Savings.” Sidebar. Retrieved from <https://blogs.lanecollege.edu/oer/>

¹⁰ Greiner, T. (2012) "All Textbooks in the Library!" A Case Study of an Experiment with Library Reserves. *Library Philosophy and Practice*, Paper 838. Retrieved from <http://digitalcommons.unl.edu/libphilprac/838/>

Appendix 2: Additional Models and Initiative Examples

Existing initiatives and models in other states serve as examples of approaches to reducing student costs. A few of the most widely recognized and impactful initiatives are noted and briefly described in this section. These examples provided a starting point to review programs already in place elsewhere and served as a basis for developing recommendations for Portland State University.

California State University

The California State University (CSU) system has been a leader in efforts to reduce the costs of student course materials. The [California State University Affordable Learning Solutions](#) program and website include access to free and low-cost materials as well as partnerships with commercial partners, such as the CSU Rent Digital program, that reduce student costs for textbooks and course materials.¹¹

Washington State Board for Community and Technical Colleges

The [Open Course Library](#), managed by the Washington State Board for Community and Technical Colleges, “is a collection of shareable course materials, including syllabi, course activities, readings, and assessments designed by teams of college faculty, instructional designers, librarians, and other experts. Some of our materials (also called open educational resources, or OER) are paired with low cost textbooks (\$30 or less). Many of the courses can be taught at no cost to students. Unless otherwise noted, all materials are shared under a Creative Commons (CC BY) license. OCL courses and materials have undergone testing for accessibility and have been designed using the industry-standard Quality Matters (QM) rubric for assessing the quality of online courses.”¹²

Florida

[Orange Grove Texts Plus \(Florida\)](#) is a joint initiative of the University Press of Florida and the Florida Digital Repository. Its goal is “to reduce the cost of books to students by offering texts that are affordable, accessible, and adaptable to reader preferences.”

State University of New York

[Open SUNY Textbooks](#) is an open access textbook publishing initiative developed by SUNY (State University of New York) libraries with support from the SUNY Press. Twenty-two titles are currently available through this program, with an additional 14 titles planned for publication in 2015. The initiative includes a peer review process for the evaluation of textbook manuscripts.

University of Massachusetts

The [UMass Open Education Initiative](#) was launched in spring of 2011 by the Provost’s Office and the University Libraries at University of Massachusetts Amherst. The initiative is “a faculty incentive program that encourages the use of existing low-cost or free information resources to support our students’ learning. Information Literacy will also be emphasized, creating opportunities for students to develop and practice the skills of critical thinking, reasoning, communication, and integration of knowledge and

¹¹ (2012) Affordable Learning Solutions. Retrieved from <http://als.csuprojects.org/home>

¹² Open Course Library (2014). What is it? Retrieved from <http://opencourselibrary.org/about/>

perspectives.”¹³ For more information, please see [“Open Educational Resources as Learning Materials: Prospects and Strategies for University Libraries.”](#)

University of Minnesota

The [University of Minnesota Open Textbook Project](#) is a library of open access textbooks from the University of Minnesota that also encourages faculty reviews of the textbooks. Partners include BCcampus, Purdue University, California Polytechnic State University, Oregon State University, and Cleveland State University.

Lumen Learning

[Lumen Learning](#) is a Portland based company that works with both K-12 and colleges and universities to reduce textbooks costs through the adoption of open courseware and open educational resources. The company estimates they have helped institutions save over a million dollars since 2012.

Tidewater Community College

[Tidewater Community College Z Degree](#) is an OER-based degree designed to reduce drastically the costs of textbooks for students. Tidewater Community College partnered with Lumen to create an entire two-year business degree as a “Z-Degree” or textbook free degree.

Institution-wide Licensing of E-Textbooks and Digital Course Materials

In 2012 and 2013 two non-profit educational organizations, EDUCAUSE and Internet2, sponsored a [series of pilot initiatives](#) involving the adoption of commercial e-textbooks.¹⁴ The pilots were used as a way to look at both the technology and the business models involved in transitioning from traditional print textbooks to digital materials. One of the piloted models was an institution-wide model of licensing packages of e-textbooks from publishers.

While this model has not generally been adopted and many of these initiatives did not continue beyond the pilot, it has been successfully implemented at some institutions. For example, Indiana University operates their “eTexts at IU” program, which they estimate allowed over 17,000 students to realize savings on more than 35,000 digital course materials in the Fall 2014 semester.

Digital Rental Programs

The California State University (CSU) Rent Digital Program provides CSU students access to over 50,000 popular e-textbook choices. Through a series of partnerships with publishers and providers, students rent textbooks for the academic term at reductions of 60% or more.

¹³ University of Massachusetts Amherst (2014). Open Education Initiative. Retrieved from <http://guides.library.umass.edu/content.php?pid=87648&sid=5393518>

¹⁴ (2013) E-Content Pilot Series. Retrieved from <http://www.educause.edu/focus-areas-and-initiatives/policy-and-security/educause-policy/issues-and-positions/e-content-pilot-series>

Appendix 3: Collected Resources

These resources were collected to provide additional information and a contextual landscape for discussion about textbook and course materials affordability. They are not necessarily endorsed by the Task Force.

University and Community Colleges OER Collections and Courses

- Orange Grove Texts Plus (Florida) <http://orangegrovetexts.org/>
- California State University Affordable Learning Solutions <http://als.csuprojects.org/home>
- Washington State Community and Technical Libraries Open Course Library <http://opencourselibrary.org/>
- Tidewater Community College Z Degree (textbook free degree) <http://www.tcc.edu/news/press/2014/zdegree0423.htm>
- Open Textbook Library <http://open.umn.edu/opentextbooks/>
- BCcampus <http://bccampus.ca/about-us/curriculum-services-and-applied-research/>

University and Community Colleges OER and Open Textbook Publishing

Initiatives

- Open SUNY Textbooks <http://textbooks.opensuny.org/>
- UMass Open Education Initiative <http://guides.library.umass.edu/oer>
- Portland State University Open Textbook Project <http://library.pdx.edu/services/publishing-archiving-at-psu/pdx-open-reducing-student-textbook-costs/>
- Lane Community College OER Faculty Fellowship <https://www.lanecc.edu/oer/oer-faculty-fellowship>
- Open Educational Resources in Oregon Higher Ed <http://openoregon.org/>

Organizations

- Lumen Learning <http://lumenlearning.com/>
- EDUCAUSE and Internet2 Initiative <http://www.educause.edu/focus-areas-and-initiatives/policy-and-security/educause-policy/issues-and-positions/e-content-pilot-series>
- Orbis Cascade Alliance Libraries Content Creation & Dissemination Team <https://www.orbiscascade.org/ccd/>

Reports

- “Adopting Best Practices for Textbook Affordability” (2014) <https://docs.google.com/a/pdx.edu/file/d/0B5NbnUQF7cQdYnE0dndTRGIEb0k/edit>
- Report on House Bill 4058 Textbook Affordability (2012) <https://olis.leg.state.or.us/liz/2013R1/Downloads/CommitteeMeetingDocument/18019>
- Qualitative Investigation of Faculty Open Educational Resource Usage in the Washington Community and Technical College System: Models for Support and Implementation <http://goo.gl/dERBtX>

- Opening the Curriculum: Open Educational Resources in Higher Education: 2014. <http://www.onlinelearningsurvey.com/reports/openingthecurriculum2014.pdf>
- Fixing the Broken Textbook Market <http://www.uspirg.org/reports/usp/fixing-broken-textbook-market>
- Florida 2012 Textbook Survey http://florida.theorange grove.org/og/file/10c0c9f5-fa58-2869-4fd9-af67fec26387/1/2012_Florida_Student_Textbook_Survey.pdf

Textbook Rentals and eTextbooks

- California State University (CSU) Rent Digital Program http://als.csuprojects.org/rent_digital_etextbooks
- Indiana University <http://itnews.iu.edu/articles/2014/McGraw-Hill-etext.php>