**Strategic Plan Recommendations from**

**Affordability and Student Debt: Instructional Materials**

**Presented to Stephen F. Austin State University Vice Presidents: January 11, 2018**

**By Dr. Lauren E. Burrow and Edward Iglesias, co-chairs**

**Instructional Materials Affordability Team Members:** *Esther Campbell, Janet Kamps, Herbert Midgley, Courtney Wooten, Louise E. Stoehr, Ashley Hall, Paul T. Henley, Chelsea Heidbrink*

 The **Instructional Materials Affordability Team** was created to investigate strategies to reduce the cost of instructional materials for Stephen F. Austin State University (SFASU) students. The team studied the relevant issues, sought campus input, developed proposed action plans and costs, and is now reporting these proposals out for further review and decisions regarding implementation.

As a team we are aware that while the cost of textbooks and similar instructional materials has skyrocketed over the years, viable low-cost alternatives have also risen at the same time. As a team, we never want the *cost* of an education to be a prohibitive factor in the *access* to an education. Therefore, we recommend that SFASU, as a University community, commit to pursuing effective low-cost options for providing instructional materials for students, with emphasis given to a shift towards Open Educational Resource (OER) adoption, adaptation, and creation by faculty.

Applicable Vision Statement Elements

From SFA Envisioned Academic Innovation Concept Paper:

*“As the world changes, so do our students and responsibilities. State governments are asking universities to do more than ever before with less support than ever before. As state support has decreased, the cost of education has increased for students and parents. Innovations such as MOOCs (massively open online courses, which often have enrollments in the thousands from locations across the globe) and open educational resources (free or low-cost textbooks or other online educational materials) have arisen to respond to these increased costs. Universities are now responsible for the education and edification of a demographic of students who may never have attended college in decades past. This new generation of students is more diverse than ever before and includes traditional-age students, returning students, a large spectrum of socioeconomic backgrounds, and varying levels of digital engagement and technological skills. Innovation is necessary to successfully educate and serve the needs of all of these students, which includes access to information and emerging technologies.”*

From SFA Envisioned Mission Statement:

*“Through the personal attention of our faculty and staff, we engage our students in a learner-centered environment and offer opportunities to prepare for the challenges of living in the global community.”*

From the SFA Envisioned Vision Statement:

[5] *“We will be an innovative university. We will reach our students where they are and prepare them for lifelong learning and career responsiveness in the 21st century. We will use cutting-edge teaching techniques and advanced research methods both inside and outside the classroom. We will be a forward-thinking university that not only is responsive to the realities of higher education but also is a leader in academia. Technology will be appropriately and sensibly infused throughout the campus in our classrooms and operations. It will facilitate-not drive-how we teach and work together.”*

From the State-Wide Goal in Texas Higher Education Coordinating Board’s 60X30TX Strategic Plan:

*“THE FOURTH GOAL: STUDENT DEBT -- By 2030, undergraduate student loan debt will not exceed 60 percent of first-year wages for graduates of Texas public institutions.”*

**Strategy #1:** Increase campus-wide costs-savings associated with on-time textbook adoption through the on-campus **Barnes and Noble** bookstore.

Rationale: Given the rising costs of a college education, quick and meaningful steps towards realizing cost-savings for our students must be acted upon. Improving the process by which faculty complete the textbook ordering process with the on-campus **Barnes and Noble** bookstore can result in immediate cost-savings for our students.

**Action Step #1:** Improve textbook adoption process with on-campus **Barnes and Noble** bookstore to increase cost-savings for students purchasing or renting course textbooks.

Purpose: As a quick and direct cost-savings practice, improving the process by which faculty complete the textbook ordering process with the on-campus bookstore can result in immediate cost-savings for our students.

**Task #1:** Changed on-campus email address to a more recognizable email address in hopes of increasing on-time faculty compliance.

Explanation: Respecting that faculty receive numerous announcements, requests, and directives sent to them via email and that faculty are keen to prioritize and respond to communications based on the designation of the sender's email address, creating an email with a handle that better identified and confirmed association with the on-campus bookstore was warranted to increase the likelihood that frequent textbook adoptions reminders would not be filtered as spam in faculty inboxes.

Resources Needed: n/a

Immediate Targets: **completed spring 2017**

Long-Range Targets: N/A

Impacted Departments: all departments

**Task #2:** Piloted a pen-and-paper textbook adoption option delivered to faculty mailboxes and retrieved by **Barnes and Noble** staff.

Explanation: Once again respecting that faculty receive numerous communications sent to them via email that require them to respond through multiple steps and through multiple platforms, the committee piloted an option to determine if alleviating the potentially cumbersome electronic process of textbook adoptions could increase and expedite task completion in those departments with low performance records, to-date.

Resources Needed: printing

Immediate Targets: **completed fall 2017**

Long-Range Targets: round 2 to commence around February 01, 2018

Impacted Departments: all departments

**Task #3:** Team members represented cost-savings associated with on-time adoption of textbooks through **Barnes and Noble** on-campus bookstore to their respective units in hopes of promoting faculty compliance through awareness of savings to students.

Explanation: Believing that, as a whole, faculty would be responsive to and proactive in their contribution to decreasing students' financial burdens for which faculty have direct control over (re: the cost of faculty-chosen course instructional materials), Team members were responsible for representing cost-savings associated with on-time adoption textbooks through **Barnes and Noble** on-campus bookstore to their respective units.

Resources Needed: statistics regarding textbook adoption costs, provided by **Barnes and Noble**staff

Immediate Targets: **completed fall 2016, spring 2017, fall 2017**

Long-Range Targets: ongoing reminders by Team members to respective units

Impacted Departments: all departments

**Task #4:** Team recommends **Barnes and Noble** on-campus bookstore staff make subsequent presentations of cost-savings associated with on-time adoption of textbooks to promote continued faculty buy-in.

Explanation: Continued representation by **Barnes and Noble** staff of cost-savings associated with on-time adoption textbooks through **Barnes and Noble** on-campus bookstore allows for faculty to receive up-to-date information and can ensures credible and knowledgeable responses to faculty inquiries.

Resources Needed: Time dedicated for semesterly presentations, starting 2018

Immediate Targets: schedule presentations for early spring 2018

Long-Range Targets: ongoing presentations

Impacted Departments: all departments

**Task #5:** Team recommends additional investigation by others into factors that limit faculty’s ability for on-time adoption of textbooks.

Explanation: During the course of Team investigation into solutions that could improve on-time adoption of textbook by faculty, issues that currently prevent faculty from completing on-time adoptions were also uncovered; including late confirmations and last-minute switches of course schedules, high rate of adjuncts in teaching roles resulting in inconsistent staffing and knowledge of course needs. Additionally, issues related to students were uncovered as problematic to students’ on-time purchasing of textbooks; including timing of financial aid disbursement. The Team recommends that additional investigations into responding to these issues be completed by responsible stakeholders.

Resources Needed: TBD

Immediate Targets: TBD

Long-Range Targets: TBD

Impacted Departments: all departments

**Strategy #2:** Articulate administrative support for campus-wide shift towards low-cost alternatives to textbooks with special focus on Open Educational Resources (OER) adoption, adaption, and/or creation.

Rationale: As campus-wide awareness about OER is accomplished, administrative support for faculty adoption, adaptation, and creation of OER must be realized in order to enable promising theory to transform into viable practice.

**Action Step #1:** Identify levels of tangible support by Administration for faculty who commit to OER adoption, adaptation, and/or creation.

Purpose: Administration's tangible support of faculty willing to commit to the longer-term and potentially revolutionary practice of OER adoption, adaptation, and/or creation signals a cohesive, University-wide commitment to improving student affordability of/access to higher education pursuits and promoting greater faculty and (potentially student) contribution to course content.

**Task #1:** Team co-chairs will present OER-related information to University Vice Presidents and then request articulation of their support for faculty adoption, adaptation, and creation of OER.

Explanation: The pursuit of OER-adoption, adaptation, and/or creation by faculty will require, to varying degrees, time, effort, guidance, and creativity. In order to assist the efforts of faculty pursuits towards an OER-shift, financial support and other compensatory actions will be necessary and may require the approval of University Vice Presidents. In various studies and reports about OER-use at other Institutes of Higher Education, Administrative support (financial and other) was high on the list of identified needs by faculty in order to successfully transition to OER-use.

Resources Needed:

* Assistance with compliance of S.B. No. 810 (*see Strategy 3 for details*)
* Details regarding S.B. No. 810’s proposed *OER Grant Program* (*see Strategy 6 for details*)
* On-campus spaces for OER-related information and promotion events
* Monies for OER-related information and promotion events
* A range of competitive stipends for an anticipated “range of commitments” to OER adaptation and creation
* Approval of course release time for OER adaptation and creation
* Positive and public recognition of faculty’s range of commitments to OER-use

Immediate Targets: course designations; support for OER-related information and promotion events; varied support for faculty OER-use

Long-Range Targets: stipends for adaptation and creation of OER

Impacted Departments: all departments

**Task #2:** Team representatives will present OER-related information to Faculty Senate, and then request that they endorse faculty adoption, adaptation, and creation of OER.

Explanation: The pursuit of OER-adoption, adaptation, and/or creation by faculty should be supported by the Faculty Senate in order to promote a campus-wide positive direction in creating the best learning environment possible for our students.

Resources Needed: TBD

Immediate Targets: endorsement of campus-wide OER-use

Long-Range Targets: TBD

Impacted Departments: all departments

**Task #3:** Team representatives will present OER-related information to Dean’s Council, Chair’s Forum, individual Colleges and then request articulation of their support for faculty adoption, adaptation, and creation of OERs.

Explanation: The pursuit of OER-adoption, adaptation, and/or creation by faculty will require, to varying degrees, time, effort, guidance, and creativity. In order to assist the efforts of faculty pursuits towards an OER-shift, financial support and other compensatory actions will be necessary, but may differ according to the needs and make-up of individual units; therefore, individual approval and articulation by unit will be warranted.

Resources Needed:

* Approval of course release time for OER adaptation and creation
* Recognition of faculty’s range of commitments to OER-use

Immediate Targets: course release time; favorable recognition of faculty efforts to commit to OER-use

Long-Range Targets: incorporate OER adoption in faculty evaluations and tenure decisions

Impacted Departments: all departments

**Strategy #3:** Comply with *S.B. No 810*.

Rationale: As a Texas public Institution of Higher Education, complying with *S.B. No. 810* is a prudent practice that can benefit our students in the form of increased savings with regards to instructional material costs.

**Action Step #1:** Add indication of courses/sections with OER textbooks (Section 2, sub-section (a), 2(F)) and courses/sections with textbook costs lower than $50.

Purpose: Designation of courses/sections with OER textbooks promotes students’ awareness about and accessibility to classrooms with low-cost instructional materials and/or OER in-use.

**Task #1:** SFA will add indication of courses/sections with OER textbooks as required by S.B. No. 810, Section 2, sub-section (a), 2(F). Additionally, SFA will add indication of courses/sections with textbook costs lower than $50.

Explanation: As a Texas public Institution of Higher Education, adopting the requirements of S.B. No. 810 is necessary both for compliance to state policy and in the interest of saving our students monies associated with the pursuit of a college education. Additionally, identification of low-cost courses/sections can aid students in their budgeting plans.

Resources Needed: TBD

Immediate Targets: add indication of courses/section with OER textbooks and low-cost instructional materials to course catalog.

Long-Range Targets: N/A

Impacted Departments: all departments

**Action Step #2:** Make searchable courses/sections requiring/recommending only OER textbooks (Section 2, sub-section (a), 4(d)(1)) and courses/sections with textbook costs lower than $50.

Purpose: Making courses/sections requiring/recommending only OER textbooks searchable promotes students’ awareness about and accessibility to classrooms with low-cost instructional materials and/or OER in-use.

**Task #1:** SFA will make searchable courses/sections requiring/recommending only OER textbooks as required by S.B. No, 810, Section 2, sub-section (a), 4(d)(1). Additionally, SFA will make searchable courses/sections with textbook costs lower than $50.

Explanation: As a Texas public Institution of Higher Education, adopting the requirements of S.B. No. 810 is necessary both for compliance to state policy and in the interest of saving our students monies associated with the pursuit of a college education. Additionally, identification of low-cost courses/sections can aid students in their budgeting plans.

Resources Needed: TBD

Immediate Targets: create a searchable list of courses that require/recommend only OER textbooks and or low-cost instructional materials; distribute the list widely via platforms frequented by students

Long-Range Targets: N/A

Impacted Departments: all departments

**Strategy #4:** Increase campus-wide awareness of and understanding about low-cost alternatives for instructional materials, with focus on OER adoption, adaption, and/or creation.

Rationale: As educators, we must commit to creating learner-centered spaces for our students that meet them “where they are,” both within their academic capability and their financial capacity. Given the increasingly prohibitive cost of education on our diverse study body, focus should be given to those innovations and emerging technologies and practices that lessen the financial burdens of our students. The Team believes that awareness of and understanding about low-cost alternatives for instructional materials, especially OER, can assist faculty in fully realizing the learner-centered environments we are committed to as a University community.

**Action Step #1:** Define Open Educational Resource (OER) for use in campus-wide communications, commitments, and support.

Purpose: A common definition, used campus-wide, is necessary to effectively and consistently communicate about OER. A common definition should be used to increase awareness about, improve understanding of, and increase commitment to the shift towards more prevalent OER use.

**Task #1:** SFA will adopt the Texas *S.B. No. 810* (Section A1.AASection 51.451, Education Code, Subdivision (4-a) definition (effective September 01, 2017): *"‘Open educational resource’ means a teaching, learning, or research resource that is in the public domain or has been released under an intellectual property license that permits the free use and repurposing of the resource by any person. The term may include full course curricula, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge.”*

Explanation: As a Texas public Institution of Higher Education, adopting the definition in use by state agencies is prudent as it should increase the likelihood that our efforts will be accurately identified for the purposes of recognition, funding, etc.

Resources Needed: TBD

Immediate Targets: Definition to be officially adopted January 2018 with wide dissemination across the University through multiple means of communication

Long-Range Targets: N/A

Impacted Departments: N/A

**Action Step #2:** Developed and administered campus-wide survey regarding existing faculty knowledge about, attitude towards, and use of OER.

Purpose: Campus employees were given the opportunity to provide input on current awareness of, attitude towards, and use of OER, so that those beliefs and practices could help guide the Team’s actions and recommendations.

**Task #1:** Developed brief survey to measure faculty awareness, attitude, and adoption practices regarding OERs.

Explanation: In order to measure current OER use on campus, a measurement instrument was developed. University Affordability Team developed and administered instrument.

Resources Needed: *Qualtrics*

Immediate Targets: **completed fall 2017**

Long-Range Targets: N/A

Impacted Departments: all departments

**Action Step #3:** Identify stakeholders, early adopters, both externally and across the campus, that can lend support to increasing awareness of and understanding about OER.

Purpose: Utilizing existing University faculty and staff that are already committed to OER is a practical way to both honor and build off of existing efforts.

**Task #1**: Team met with Jonathan Helmke, *Associate Director for Library Information Services*

Explanation: The pursuit of OER-adoption, adaptation, and/or creation by faculty will require, to varying degrees, time, effort, guidance, and creativity. In order to assist the efforts of faculty pursuits towards an OER-shift, support will be necessary to alleviate common barriers to faculty adoption, including assistance locating resources for subject areas.

Resources Needed: TBD

Immediate Targets: create OER Libguide

Long-Range Targets: TBD

Impacted Departments: all departments

**Task #2:** Team identified Dr. Jeremy Stovall, *Asst. Professor Arthur Temple College of Forestry and Agriculture*, as a model faculty member for OER-creation with students.

Explanation: The pursuit of OER-adoption, adaptation, and/or creation by faculty will require, to varying degrees, time, effort, guidance and creativity. In order to assist the efforts of faculty pursuits towards an OER-shift, identification of faculty who are successfully using OER can provide models and/or direct guidance for other faculty.

Resources Needed: TBD

Immediate Targets: identify additional faculty as OER-user models

Long-Range Targets: faculty mentorships by faculty identified as veteran OER-users; determine compensation (financial or other) for faculty mentors

Impacted Departments: all departments

**Action Step #4**: Host informational session for faculty outlining the statistics, benefits, and practices associated with OER adoption, adaptation, and creation.

Purpose: In order for a shift to OER to occur, faculty must first understand the basics about OER.

**Task #1**: Team participated in on-campus informational session by *TopHat.*

Explanation: The pursuit of OER-adoption, adaptation, and/or creation by faculty will require, to varying degrees, time, effort, guidance and creativity. To better understand faculty options for OER-use, the *Instructional Materials Affordability Team* invited *TopHat* to conduct an individual informational session. *Top Hat* allows faculty to customize textbooks, test banks, etc. as part of next generation OER capabilities.

Resources Needed: N/A

Immediate Targets: **completed fall 2016**

Long-Range Targets: TBD

Impacted Departments: *Instructional Materials Affordability Team*

**Task #2**: Team participated in virtual informational session by *Loud Cloud.*

Explanation: The pursuit of OER-adoption, adaptation, and/or creation by faculty will require, to varying degrees, time, effort, guidance and creativity. To better understand faculty options for OER-use, the *Instructional Materials Affordability Team* participated in an informational session about courseware, or an access code, built around courses that utilize OER materials that have built in test banks, PowerPoints, and other interactive amenities. The cost of the courseware is $50. The demonstration was coordinated by the on-campus **Barnes and Noble** as part of their *Loud Cloud* product.

Resources Needed: N/A

Immediate Targets: **completed fall 2017**

Long-Range Targets: TBD

Impacted Departments: *Instructional Materials Affordability Team*

**Task #3:** In collaboration with the **Barnes and Noble** on-campus bookstore, planned and executed "Making the Shift to Open Educational Resources (OER)," an OER-informational event.

Explanation: The pursuit of OER-adoption, adaptation, and/or creation by faculty will require, to varying degrees, time, effort, guidance and creativity. Informational sessions assist faculty in awareness about and understanding of low-cost alternatives to textbooks, including OER. This session featured examples by current faculty OER-users, testimonies of savings by a student panel, and a demonstration of *Loud Cloud* services by **Barnes and Noble** staff.

Resources Needed: on-campus meeting space

Immediate Targets: **completed November 10, 2017**

Long-Range Targets: N/A

Impacted Departments: all departments

**Task #4**: Plan and execute additional information and promotion events. Team will reach out to articulate collaboration for future support and events with the **Center for Teaching & Learning (CTL)**.

Explanation: The pursuit of OER-adoption, adaptation, and/or creation by faculty will require, to varying degrees, time, effort, guidance and creativity. In order to assist the efforts of faculty pursuits towards an OER-shift, additional information and promotion events are recommended as opportunities for faculty to become education, to ask questions, and to receive personalized guidance. As a center for comprehensive faculty development to enable the promotion of high-impact practices that lead to student success, the **CTL** is already poised as an obvious partner in pursuit of a practice aimed at improving student learning environments.

Resources Needed:

* Monies for snacks offered in sessions, printing for costs associated with marketing and presentation, for fees of potential external consultants/speakers
* On-campus spaces to host events

Immediate Targets: plan information and promotion events for spring 2018

Long-Range Targets: collaborate on faculty mentorship opportunities for fall 2018

Impacted Departments: all departments

**End of semester presentation/awards showcase**

**Task #5**: Plan and execute additional information and promotion events. Team will reach out to the **Student Government Association (SGA)** to articulate endorsement of campus-wide faculty use of OER and for collaboration on future events.

Explanation: In order to ensure that students are represented in this student-impacting practice, the **SGA** can lend support for the Team’s goals by presenting convincing rationale by students for why faculty should shift to OER and other lower-cost alternatives to textbooks.

Resources Needed:

* Monies for snacks offered in sessions, printing costs associated with marketing and presentation
* On-campus spaces to host events

Immediate Targets: plan promotion events; work with SGA to identify activities/practices that support faculty shift to OER use

Long-Range Targets: hold faculty accountable for OER use and/or commitments to other lower-cost alternatives to textbooks

Impacted Departments: all departments

**Strategy #5:** Continuously assess the level of commitment shifts to OER use, campus-wide, paired with a research agenda that documents and promotes University success.

Rationale: Monitoring increases in faculty shift to OER use is essential to document success, identify areas needing additional attention, and as a means of encouraging continued support for OER use.

**Action Step #1:** Document changes in faculty use of OER, after Team’s execution of informational and promotion events.

Purpose: Campus employees must be given the opportunity to provide input on changes in awareness of, attitude towards, and use of OERs so that those beliefs and practices can help guide future actions and recommendations.

**Task #1:** Develop brief survey to measure faculty awareness, attitude, and adoption practices regarding OERs.

Explanation: In order to measure changes in OER use on campus, a measurement instrument must be developed. University Affordability Team will develop and administer instrument.

Resources Needed: *Qualtrics*

Immediate Targets: survey faculty spring and/or fall 2018

Long-Range Targets: follow-up survey faculty spring and/or fall 2019

Impacted Departments: all departments

**Task #2:** Write and publish articles, present findings about student and faculty experiences with OER.

Explanation: As evidence of the impact shifting to OER has on our University faculty and students, documentation of efforts and practices should be disseminated via presentation and publication.

Resources Needed:

* Monies for travel support to state and/or national conferences to disseminate findings about OER use on campus

Immediate Targets: publish and/or present survey results, anecdotal evidence of University success, re: OER use

Long-Range Targets: TBD

Impacted Departments: *Instructional Materials Affordability Team*

**Strategy #6:** Determine shift in leadership for on-going monitoring and maintenance of Team’s mission: “commitment to OER use and other low-cost alternatives for instructional materials.”

Rationale: Maintaining promotion of and support for OER use will require time and efforts beyond that which a volunteer service committee can manage. Commitment to a campus-wide shift to OER use warrants dedicated personnel to ensure a smooth transition and to enable continued support for faculty.

**Action Step #1:** Assemble, appoint, and/or identify personnel who can maintain and move forward the efforts of the *Instructional Materials Affordability Team*.

Purpose: Building off of and increasing the forward motion of the Team’s mission will ensure that SFA becomes a key player in the OER movement, setting the tone and expectations for other institutions to follow with regards to innovation that promote positive student learning environments through responsive practices. Current or potential offices and/or personnel should be identified for dedicated efforts for this mission.

**Task #1:** Join network of institutions implementing OER.

Explanation: The shift to OER requires support and guidance that can be achieved through participation in networks of institutions implementing OER. Currently, members of the *Instructional Materials Affordability Team* have subscribed to *“SPARC Libraries and OER Forum,”* and it recommended that dedicated efforts be devoted to staying active in this virtual community space.

Resources Needed: TBD

Immediate Targets: TBD

Long-Range Targets: TBD

Impacted Departments: TBD

**Task #2:** Participate in S.B. No. 810’s *Feasibility Study on State Repository of OER*.

Explanation: The *Feasibility Study on State Repository of Open Educational Resources* (Section 5. Subchapter C, Chapter 61, Education Code, Sec. 441.021) is a collaboration between the commission and relevant state agencies and other stakeholders, including the Texas Higher Education Coordinating Board, the Texas Education Agency, and representatives of public institutions of higher education and school districts with a report of results submitted *no later than September 1, 2018* to the governor, lieutenant governor, speaker of the house of representatives, and each standing legislative committee with primary jurisdiction over higher education. It is recommended that dedicated efforts be devoted to this task.

Resources Needed: TBD

Immediate Targets: Report results by September 01, 2018

Long-Range Targets: TBD

Impacted Departments: TBD

**Task #3:** Investigate potential funding sources with **Office of Research and Sponsored**

**Programs (ORSP)**.

Explanation: The shift to OER by faculty may require additional funds to compensate faculty for their time and efforts. It is recommended that existing sources of financial support be investigated with assistance from ORSP.

Resources Needed: TBD

Immediate Targets: TBD

Long-Range Targets: TBD

Impacted Departments: TBD

**Task #4:** Investigate potential participation in S.B. No. 810’s *Open Educational Resources Grant Program.*

Explanation: The *Open Educational Resources Grant Program* (Section 5. Subchapter C, Chapter 61, Education Code, Section 61.0668) would allow a faculty member of an institution of higher education may apply to the board for a grant to redesign a course at the institution to exclusively use open educational resources. It is recommended that dedicated efforts be devoted to learning more about and potentially supporting participation in this grant.

Resources Needed: TBD

Immediate Targets: TBD

Long-Range Targets: TBD

Impacted Departments: TBD