

Price Transparency

PRICE TRANSPARENCY

State Approaches to OER/No Cost/Low Cost Course Schedule Designators

BOYOUNG CHAE; KEVIN CORCORAN; MICHAEL DALY; ANN FIDDLER; JEFF GALLANT;
JAMES GLAPA-GROSSKLAG; AMY HOFER; AND MICHELLE REED

Mavs Open Press

Arlington



Price Transparency Copyright © 2019 by Boyoung Chae; Kevin Corcoran; Michael Daly; Ann Fiddler; Jeff Gallant; James Glapa-Grossklag; Amy Hofer; and Michelle Reed is licensed under a [Creative Commons Attribution 4.0 International License](https://creativecommons.org/licenses/by/4.0/), except where otherwise noted.

CONTENTS

About the Publisher	vii
About this Project	viii
PART I. <u>MAIN BODY</u>	
1. California James Glapa-Grossklag	1
2. Connecticut Kevin Corcoran	3
3. Georgia Jeff Gallant	6
4. New York (CUNY) Ann Fiddler	9
5. New York (SUNY) Michael Daly	12
6. Oregon Amy Hofer	15
7. Texas Michelle Reed	17
8. Washington Boyoung Chae	22
Links by Chapter	27

ABOUT THE PUBLISHER

If you are an instructor who is using this OER for a course, please let us know by filling out our [OER Adoption Form](#).

ABOUT MAVS OPEN PRESS

Creation of this resource was supported by [Mavs Open Press](#), operated by the University of Texas at Arlington Libraries (UTA Libraries). Mavs Open Press offers no-cost services for UTA faculty, staff, and students who wish to openly publish their scholarship. The Libraries' program provides human and technological resources that empower our communities to publish new open access journals, to convert traditional print journals to open access publications, and to create or adapt open educational resources (OER). Our resources are openly licensed using [Creative Commons licenses](#) and are offered in various e-book formats free of charge, which can be downloaded from the Mavs Open Press [OER catalog](#). Optional print copies of this text may be available through the UTA Bookstore or can be purchased directly from [XanEdu](#), Mavs Open Press' exclusive print provider and distributor.

ABOUT OER

OER are free teaching and learning materials that are licensed to allow for revision and reuse. They can be fully self-contained textbooks, videos, quizzes, learning modules, and more. OER are distinct from public resources in that they permit others to use, copy, distribute, modify, or reuse the content. The legal permission to modify and customize OER to meet the specific learning objectives of a particular course make them a useful pedagogical tool.

ABOUT PRESSBOOKS

[Pressbooks](#) is an open source, web-based authoring tool based on WordPress, and it is the primary tool that Mavs Open Press uses to create and adapt course materials. Pressbooks should not be used with Internet Explorer. The following browsers are best to use with Pressbooks:

- Firefox
- Chrome
- Safari
- Edge

CONTACT US

Information about [open education at UTA](#) is available online. Contact us at oyer@uta.edu for other inquiries related to UTA Libraries publishing services.

ABOUT THIS PROJECT

OVERVIEW

Few formal reports have been published on the implementation and impact of OER/No Cost/Low Cost designations integrated into course schedules at colleges and universities. This booklet aims to lessen the literature gap by providing written accounts of the course marking drivers, implementation strategies, challenges, and lessons learned presented by panelists at the 16th Annual Open Education Conference in Phoenix, Arizona, in October 2019. [Slides](#) from the panel presentation are available online.

PANEL ABSTRACT

The practice of adding either OER or no-cost / low-cost materials designators in course catalogs is on the rise, aiming to give more visibility and transparency to students and administrators as to which courses offer these more affordable options. Panelists representing system-wide and state-wide efforts from California, Connecticut, Georgia, New York, Oregon, Texas, and Washington will share their experiences and expertise in implementing systems and processes to put these new designators in place. The panelists will share the drivers behind these efforts, challenges faced along the way, and what institutions, higher education systems, and state-wide organizations should keep in mind when starting their own course marking projects.

ABOUT THE AUTHORS

Nicole Allen is the Director of Open Education at SPARC. A decade and a half ago, she was an undergraduate student frustrated with the cost of textbooks. Today, she is an internationally recognized policy expert, community organizer, and speaker on open education, educational technology, and higher education reform. Motivated by the belief that everyone, everywhere should be able to participate in shaping human knowledge, Nicole's work includes advocating for effective open policies, supporting open education programming for SPARC's network, and empowering emerging leaders in the open education movement.

Boyoung Chae is a Policy Associate of Educational Technology and Open Education with the Washington State Board for Community & Technical Colleges (SBCTC). She led the development of several state-wide OER initiatives, such as [Open Course Library](#) and [Open Washington](#). Recently, with her SBCTC colleague Mark Jenkins, she co-authored an [OER research report](#) awarded the Open Education Consortium's Open Research Award for Open Education Excellence, and a book chapter for UNESCO publication ([Open Educational Resources: Policy, Costs and Transformation](#)). Mark Jenkins is the director of Educational Technology and Open Education division of SBCTC and a co-author of the original article previously published at [WCET Frontiers](#). He has graciously allowed the reproduction of this article for the Price Transparency project.

Kevin Corcoran is the Executive Director of Digital Learning for the Connecticut State Colleges &

Universities System. Kevin is responsible for the development and support of system-wide strategies for the effective use of digital learning tools and content that focuses on quality standards and practices, student engagement, accessibility and affordability. Kevin currently serves as the Statewide Coordinator for Connecticut's Open Educational Resources Coordinating Council and is one of the founders of the Northeast OER Summit. He also chairs a CSCU system-wide Open Education Resources council and formerly co-chaired a Connecticut Legislative OER Task Force.

Michael Daly is the Director of Operations for SUNY OER Services (SOS), a shared service organization working with SUNY campuses, faculty, and students to drive large-scale adoption of open educational resources (OER) as a strategy for increasing student success and empowering faculty pedagogy. In his role, he also facilitates the active participation and engagement with SUNY's external partners in OER, including rpk GROUP, as campuses develop OER sustainability plans that reflect local values and cultures. Prior to joining SOS, he spent ten years as the Instruction/Public Services librarian at Fulton-Montgomery Community College (SUNY), where he developed and lead a robust campus-wide OER program.

Ann Fiddler is the Open Education Librarian for the City University of New York in the Office of the Dean of Library Services. This office supports 32 libraries across 24 campuses in the 5 boroughs of New York City. Ann has been overseeing Open Educational Resource initiatives across the university since 2014. She has been the principal investigator for grants in support of OER from Achieving the Dream, The Gates Foundation, and The Public Interest Technology Network. She is currently leading the University-wide OER Initiative generously funded by New York State. She works together with the Scholarly Communications Librarian to promote open pedagogy and practice at CUNY

Jeff Gallant is the Program Director of Affordable Learning Georgia, an initiative of the University System of Georgia (USG). He directs the implementation of strategies and activities identified for increasing textbook affordability within the USG including grant programs, partnerships, and collaborative projects, coordinates Campus Champions and Library Coordinators at each USG institution, conducts data analyses of programs and develops reports, and manages system-wide communications including the initiative's website and newsletter. Jeff often represents Affordable Learning Georgia externally at meetings, conferences, and site visits, and he has served as a mentor in the SPARC Open Education Leadership program since its inception.

James Glapa-Grossklag is Dean, Educational Technology, Learning Resources, and Distance Learning at College of the Canyons. He supervises Online Education, Tutoring, Libraries, and Educational Travel. For the California Community Colleges Chancellor's Office, he directs the Distance Education Captioning and Transcription grant and co-coordinates Technical Assistance for the Zero Textbook Cost grant program. James is past President of the Open Education Consortium; the Community College Consortium for Open Educational Resources; and Directors of Educational Technology in California Higher Education. He has served as a trainer on OER for the US State Department and is a frequent invited speaker on OER and online education. He teaches courses on accessibility and digital citizenship. He earned tenure as a faculty member in history.

Amy Hofer, Coordinator, Statewide Open Education Library Services, is the OER librarian for Oregon's colleges and universities; visit the Open Oregon Educational Resources [website](#) to learn

more. Amy is a coauthor of the book “Transforming Information Literacy Instruction: Threshold Concepts in Theory and Practice.” By night she is a fiddler and square dance caller.

Michelle Reed is Associate Librarian and Director of Open Educational Resources at the University of Texas at Arlington. She leads OER initiatives, directs OER publishing, and manages a grant program to advance the use of open resources on campus. She is a former fellow of the Open Education Group’s OER Research Fellowship Program and the SPARC Open Education Leadership Program. She is active in both statewide and national OER efforts, serving on the University of Texas System Affordable Learning Accelerator Task Force, as a presenter for the Open Textbook Network, and as presenter coordinator and curriculum designer for the Association of College & Research Libraries’ OER and Affordability Roadshow. She serves as project manager, co-editor, contributing author, and publisher for the *Marking Open and Affordable Courses* book project.

ABOUT THE COVER

Brittany Griffiths, UTA Libraries’ Publishing Specialist, designed the cover. The image used is [“Map – United States of America”](#) from Pixabay and is licensed [CC0](#).

Thanks to Kartik Mann of UTA Libraries for supporting the creation of this resource.

CHAPTER 1.

CALIFORNIA

JAMES GLAPA-GROSSKLAG

COURSE MARKING DRIVERS

SB1359 was passed in September 2016, going into force in January 2018. The law “requires California Community Colleges and California State Universities and requests the University of California system to include a symbol/logo in the online campus course schedule by January 1, 2018 for courses that exclusively use digital course materials that are free of charge to students and therefore not required to be purchased.”

The potential scale of impact is significant. With 114 colleges serving 2.1 million students, the California Community Colleges (CCC) comprise the largest public system of higher education in the US. The California State University (CSU) with 23 campuses serving nearly 500,000 students, is the largest four-year public university system in the US. Notably, the law does not apply to the state’s research-focused University of California.



*Figure 1.1: Zero Cost Textbook
Logo*

IMPLEMENTATION

Between the passage of the law in 2016 and the implementation of the law in 2018, both the CCCs and CSU systems engaged in outreach to the field. The CCCs’ system office issued a memo to college leadership explaining the requirements and created a sample logo that colleges could choose to adopt. The CSU system’s Affordable Learning Solutions team engaged the field with a series of webinars and FAQs.

The CCCs refer to the designator as “ZTC” for Zero Textbook Cost. The CSU formally refers to the designator as “ZCCM” for zero-cost course materials.

CHALLENGES AND LESSONS LEARNED

Interpretation of the legal requirements differs from institution to institution, as well as between system offices. The CCC system office guidance states that the “symbol is a requirement only for those courses where the cost of the textbook is zero dollars and no cost to the student.” The CSU system office guidance states that “courses using library or other course materials paid for by the campus, resulting in free access to all students for all of the course materials, should get a ZCCM designation. Courses that do not require any additional instructional materials should also be identified in the class schedule using the same ZCCM designation.”

Both the CCCs and the CSU are de-centralized systems, with each institution making its own choice about bookstore contracts, student information systems, nomenclature for describing class offerings, and data collection. To this point, no statewide implementation data has been gathered.

Some colleges use the ZTC symbol to designate sections that use OER or library holdings. Other colleges use the symbol to designate also sections in which no textbook is required. The Academic Senate of the California Community Colleges has called for clarification from the state on these issues (ASCCC Resolution 13.01, Spring 2019). Other local implementation variations arise from:

- Using different student information systems – does the SIS permit you to add symbols at the section level?
- Adopting different nomenclature – does ZTC automatically equate with OER? What happens when an open textbook is adopted with a fee-based homework system?
- Varied college store structures – does the institution rely on the college store to display price information? If so, different third-party vendors and in-house stores use different scheduling software and have their own differences in nomenclature.

While a low-cost designation (LC) is not covered by SB1359, the introduction of the ZTC designation and an increasing awareness of cost pressures on students have accelerated discussions around LC. Would this increase transparency for students? Would this incentivize or penalize faculty who do or do not adopt OER? How many symbols in a schedule are useful for students’ decision making?

OER advocates can cheer the fact that the state legislature promotes price transparency and recognizes the potential of OER to help reduce the cost barrier to education. Nevertheless, implementation of such laws would be smoother and more consistent if representatives of the field were included in crafting the legislation and developing state system guidance.

CHAPTER 2.

CONNECTICUT

KEVIN CORCORAN

COURSE MARKING DRIVERS

Within the Connecticut State Colleges & Universities system (CSCU), our labelling efforts started with an Achieving the Dream (AtD) grant. Housatonic Community College, located in Bridgeport, CT, received a grant to develop a Z-degree Associates in General Studies. As part of the grant requirements, Housatonic marked those courses within the program by appending “OER” to the course title within the student information system. Jennifer Nohai-Seaman, Housatonic’s AtD OER Degree Initiative Grant Coordinator, stated that “our goals were two-fold. We wanted to let students know that these courses had OER materials, which meant that they were saving some money, and that they could take an entire degree of courses that are OER. Secondly, it was also to advertise to other faculty that they, too, could join the OER movement at Housatonic, and have their courses marked OER.”

Capital Community College, located in Hartford, CT, implemented a similar approach to marking courses using no-cost or low-cost course materials by appending #NOLO to their course titles. Eileen Rhodes, Director of Library Services at Capital, stated that “the main factor from the student perspective in purchasing textbooks is cost, so we wanted to highlight that issue by creating a designator that included that concept. To label OER would require additional education on the part of the college staff to ensure students understood what OER meant. The designator not only encompasses OER, but also includes other low-cost alternatives and can also include library resources. The goal was to create a memorable designator that would be short in characters (to fit in the allotted character space in Banner) and also to be descriptive and appealing to students so that we could build a marketing campaign around the concept, and ideally, cost transparency for students.”

IMPLEMENTATION

In December 2017, CSCU system formed a system-wide OER Advisory Council to explore best practice for OER awareness and adoption. The council recommended a uniform adoption of #NOLO for marking any course sections that utilized no-cost or low-cost course materials and adapted the definition and parameters in use by Oregon and Georgia. There was some debate on whether we should adopt two separate designators to mark no-cost vs. low-cost, but the council felt it was better to simplify the process and allow for some OER providers that have fees associated with their services.

At this point in time, the application of the #NOLO designator was a manual process. It required the

addition of the designator to the section title prior to registration and then its removal after add/drop to ensure the label didn't appear on the student transcript. This process severely hampered our long-term reporting abilities. In total, four colleges adopted the #NOLO designator in this fashion.

Your materials for:
LIB 100 - Lib & Resch Methods

☒ Adoptions not Required

☐ This course does not use books

☒ **Course uses OER/Zero cost course**

☐ Other non-bookstore materials

[Continue](#)

[illegible]

The request to implement the designator within the student information system was supported in Fall 2018 by the president's cabinet. The ability to mark courses was enabled late Fall 2018 and the student-facing features were enabled in January 2019. Each institutional representative on the OER council engaged with their local governance structures to request a vote for adoption.

CHALLENGES AND LESSONS LEARNED

Reflecting on how quickly our effort went from recommendation to implementation, there were certainly some areas that needed more attention. While there was buy-in from system-level executives and institutional academic leadership, we could have spent more time discussing the benefits of price transparency and the criteria of the course designator with our faculty constituents and our course schedulers. We have had some confusion on whether rental pricing is allowed in our cost calculations – it is not.

Since each institution determined whether to opt-in or not to our NOLO effort, we do not have full participation. As mentioned earlier, we did not refine our messaging on the benefits of NOLO which has led to two recurring concerns:

1. Price transparency will harm enrollment of non-participating faculty
2. Price transparency will lead to the selection of materials solely based on price and not for their alignment or quality. We are currently working with our Institutional Research Department to study the impact labelling has on enrollment decisions as well as student performance and persistence.

One more area that needs more attention is our connection to the bookstore. While not directly connected to the process of labelling courses, how the bookstore is displaying, pricing, and fulfilling materials request has caused some hiccups. In isolated cases, we have seen negotiated publisher pricing extend beyond our cost threshold due to bookstore mark-up. Additionally, in some rare cases, we have seen print versions of OpenStax books marked as required versus optional, pushing the materials cost beyond our cost threshold.

As our OER council reconvenes for the current academic year, we will reassess our efforts and try to address our messaging needs.

CHAPTER 3.

GEORGIA

JEFF GALLANT

COURSE MARKING DRIVERS

VISIBILITY TO STUDENTS

The University System of Georgia (USG) has had affordability as a strategic goal since the implementation of the [Complete College Georgia](#) initiative in 2012. Making courses that use OER, no-cost, and low-cost resources visible to students at the point of registration would be another step in the right direction.

IMPACT TRANSPARENCY

[Affordable Learning Georgia](#) (ALG) has been attempting to reduce textbook costs to students since 2014. While we have faculty-reported data to support the impact of the program through our grants, we have no idea what is happening outside of our grants in awareness-raising efforts. Because ALG works from within a System Office supporting 26 institutions and not one university with 26 campuses, we can't just suddenly unify the way This includes our Champions and Coordinators' workshops, marketing campaigns, and appearances at important meetings. Knowing more about this will allow us to understand the impact of ALG-related efforts outside of what we directly fund.

ENHANCED DECISION-MAKING

ALG programs have supported the work of many small teams of faculty at institutions in adopting, adapting, and creating OER. However, once the project is complete, it is tough to gauge how these efforts may spread throughout departments, or even within institutions. Having readily-available data on which courses have no / some / all no-cost or low-cost implementations would assist us in knowing which departments may benefit from us reaching out and supporting a department-wide scale-up of these implementations, therefore increasing the impact of our supported projects and further reducing textbook costs.

AUTHORITATIVE AND AUDIT-READY METRICS

Many state programs are measurable through authoritative quantitative data supporting their goals, such as revenue, enrollment numbers, or retention rates. Others are measurable through "softer" qualitative measures such as self-reported patron satisfaction on surveys. While we do quite a bit of qualitative inquiry in order to determine faculty and staff needs for the program and ensure we are

providing high-quality support, we need quantitative data in order to report on our cost-reduction impact. At the moment, we rely on faculty-reported estimates through our grant program, and these estimates, while well-maintained, checked yearly, and accepted as our best possible measure, are not deemed auditable. A uniform 26-institution way of reporting no-cost and low-cost resource use, using the same data that other programs use to determine enrollment, graduation rates, and retention, would provide us with a reasonable way for external reviewers to check on the program.

IMPLEMENTATION

In 2016, ALG partnered with the GeorgiaBEST (systemwide Banner registration system) staff to create two new attributes in the registration system – ZNCM (Z = systemwide designator, NCM = no-cost materials) and ZLCM (LCM = low-cost materials). Technical documentation on Banner usage was created by the GeorgiaBEST team and is reserved for Banner administrators due to restrictions on proprietary platform information.

Administrative documentation on the [designators](#) was created by ALG and is available to the public. The first draft of the administrative documentation was heavily based on the Portland Community College [Designation FAQ](#). Subsequent drafts include revisions due to meetings with and questions from USG institution registrars, advisors, administrators, and faculty.

The Vice Chancellor of Library Services, Lucy Harrison, reports to each institution about their compliance with administrative guidelines, and works with the Executive Vice Chancellor of Academic Affairs in ensuring institutional compliance. I gather the section and enrollment data from each institution and analyze it using the designators to determine no-cost/low-cost material usage and its potential impact.

CHALLENGES AND LESSONS LEARNED

LACK OF UNIFORM DATA COLLECTION AND PRESENTATION

Despite having a system-wide registration system and a department keen to work with us on implementing the designators, so much of this process was still out of our hands and in the hands of twenty-six largely independent institutions. The following factors keep these designators from being uniformly presented and used across the system:

- Institutions enter course sections into the registration system in various ways. Some institutions have faculty do this themselves. Others have administrative staff do so. Administrative staff receive varying amounts of information about the sections in their departments.
- Institutions gather textbook adoption information in various ways. Some have quasi-enforced mandates which require this information to be entered in the syllabus. Others have the information entered in the bookstore's textbook catalog system. Many do not have 100% adoption reporting regardless of the rules.
- Institutions present the same registration system in various ways. While Banner itself has a student-facing interface, institutions often place homegrown platforms and/or websites on top of this interface, and these usually need to be changed to display ZNCM and ZLCM

designators correctly to students.

LACK OF ENFORCEMENT

Affordable Learning Georgia cannot enforce guidelines, even if a systemwide set of guidelines is in place and a systemwide technical implementation happens. We cannot stop faculty, administrators, or deans from incorrectly or falsely reporting ZNCM or ZLCM courses. We also cannot realistically detect this if it happens. One possible method would be checking every up-to-date syllabus for each ZNCM/ZLCM section mid-semester, but this would require so many human hours that it would be infeasible for us.

DIFFERENCES IN COST SAVINGS ATTRIBUTION

Affordable Learning Georgia cannot attribute every ZNCM or ZLCM course to our own efforts. We can only report on what has changed, and what is most likely linked to our grants. Reporting ZNCM/ZLCM metrics therefore needs to be about the system, not about our initiative. ZNCM/ZLCM data could, if consistent, be used as an automatic sustainability check on our grants and their impact, replacing faculty-reported surveying annually after the end of each grant project.

Because of the challenges above, ALG is not yet able to use this ZNCM and ZLCM designator data to make decisions, or to report on our impact in an audit-ready method.

CHAPTER 4.

NEW YORK (CUNY)

ANN FIDDLER

COURSE MARKING DRIVERS

City University of New York (CUNY) has a central student information and registration system called CUNYFirst, a configured version of Peoplesoft's enterprise content management system. It was rolled out in phases to the campuses starting in 2013 and was in place at all 24 campuses in 2017. It also has a global search function which enables students to search by a variety of criteria, including time and day but also course attributes like "Writing Intensive" or whether it fits into one the general education requirements referred to as "Pathways" at CUNY.

The idea to add a search attribute denoting OER began in Fall 2016 and was conceived during ATD grantee convenings. Campus leaders discussed how best to name the designation. At the time, it seemed trying to educate students about the term "OER" would be an additional barrier to marketing and communications. Additionally, it became clear that Zero Textbook Cost courses could be a combination of OER and openly accessible material and library resources. Though under the initial ATD grant we were required to use only openly licensed materials, the larger framework of all the open and affordable initiatives at CUNY was more forgiving. There were already campus initiatives aimed at eliminating the cost of textbooks, but not necessarily using only openly licensed materials. As long as copyright was not infringed, it was acceptable to use freely available materials as well as library licensed content. The concept of a zero textbook cost course took root. After reviewing what other institutions were using and internal conversations, "Zero Textbook Cost" (ZTC) course was settled on as the name. Implementing the designation was not a difficult process. The central Registrar added it to CUNYFirst, where it exists along with other attributes. The Registrar was supportive and cooperative, and the office continues to work with OLS to provide and hone data.

IMPLEMENTATION

The first task was to get faculty to apply the attribute to their course in CUNYFirst, a process which varied from campus to campus. The course attribute has to in some way be reported to the registrar to appear in the registration system. Faculty themselves cannot add an attribute to their course via CUNYFirst. Faculty are required to input textbook information into CUNYFirst, which is where they can indicate that course is not using a textbook or is using a free or open textbook. However, this is a separate process from marking the course ZTC in CUNYFirst. Responsibility for officially marking ZTC courses, based on faculty-submitted data, is managed by the department chair or the course coordinator.

Though the process initially seemed simple, it turned out to be a challenge to some campuses. OLS put together documentation to educate campuses stakeholders on how to indicate a course as ZTC in CUNYFirst and shared this information on the [library's website](#). Still, some educators felt it was an additional burden they were unhappy about. The implementation team also heard from campus OER leads both individually and as a group at our bi-semester OER representatives meetings. The concerns noted that navigating inconsistent workflows for course marking resulted in a significant increase in the representatives' own workloads. They also shared that faculty were frustrated with the process. To alleviate the burden, OLS hired a part-time employee to work in the central registrar's office who assumed responsibility for creating a list of ZTC classes that could be sent directly to the central registrar for coding.

Additionally, Akademos, the online bookstore that serves a majority of campuses, cooperated in the process. All instructors are required to report their resource use to the bookstore. The store customized their system for CUNY allowing instructors to select a button indicating that the course is a "Zero Textbook Cost" course (See Figure 2). This automatically syncs with the registration system triggering the attribute. However, even with this ease of use, problems remained. After looking closely at courses that had been designated ZTC via Akademos, OLS discovered that some instructors who had chosen the ZTC option also listed a required textbook. Although this is likely user error, it is troubling that students searching for a ZTC course could sign up for a course that might not actually be ZTC. Akademos continues to work with us to modify the system to prevent this error.

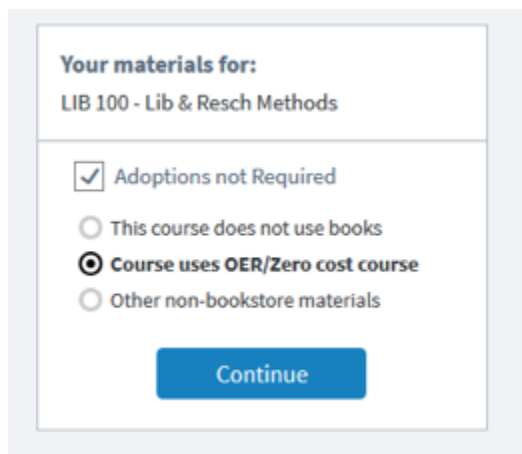
The image shows a web form titled "Your materials for:" with the course "LIB 100 - Lib & Resch Methods" listed below it. There are four radio button options: "Adoptions not Required" (unchecked), "This course does not use books" (unchecked), "Course uses OER/Zero cost course" (checked with a black dot), and "Other non-bookstore materials" (unchecked). A blue "Continue" button is at the bottom.

Figure 4.1: Options in Akademos for designating a course as OER/ZTC

In addition to these workflow issues, we received anecdotal indications that some faculty were reluctant to list their course as ZTC due to perceived pressure from within their department. For example, a faculty member expressed trepidation at adding the ZTC designation because they felt that it would be looked down upon by the department chair and the faculty member did not have tenure. While there is strong support of the initiative, some faculty remain steadfast in their belief that students should choose courses based on the instructor rather than resource costs. The implementation team has treaded lightly around these issues.

In a place as large and sprawling as CUNY, communication is always a challenge. As a commuter university, faculty and students come to campus only when they need to and student involvement in other aspects of academic life is limited. Therefore, reaching students and faculty is a major challenge.

Despite some success, there is still more work to be done to fine-tune processes and try new methods of communicating the existence and importance of the ZTC attribute. It has also become clear that it is necessary to implement a Low Cost LTC attribute to be inclusive to classes that cannot abide by the no cost attribute.

CHALLENGES AND LESSONS LEARNED

According to a survey administered in Fall 2017 and Spring 2018 to students who were in ZTC courses at one of the senior colleges, the vast majority of students didn't actually know they were in a ZTC course when they signed up nor were they aware of the ZTC attribute in general. As we approach the fourth semester of the ZTC attribute's existence, we are taking steps to partner with CUNY Central's Student Affairs office to fine tune promotional materials and are beginning to network with various student leadership groups at CUNY campuses to enlist them in getting the word out to students. We hope that increasing student awareness of the ZTC attribute will increase student demand for such courses, which is ultimately a path towards sustainability for any OER or ZTC initiative.

CHAPTER 5.

NEW YORK (SUNY)

MICHAEL DALY

Large portions of this content are derived from *Marking Open and Affordable Courses: Best Practices and Case Studies*, an Open Access book forthcoming from Mavs Open Press in 2020. The content is used with permission from the book's State University of New York System case study by Alexis Clifton, Tony DeFranco, and Michael V. Daly.

COURSE MARKING DRIVERS

Since 2017 the State University of New York (SUNY) has received four million dollars annually from the New York State budget to drive the adoption and use of open educational resources (OER) in large enrollment, general education courses.

As a federated system, SUNY's sixty-four campuses primarily function as independent units, with shared direction and services stemming from the system offices. SUNY's Office of Library and Information Services distributed state fiscal year dollars allocated for OER to individual campuses, to let them determine the most fitting way to use these funds within their local cultures. By accepting OER funds, SUNY institutions agreed to three things:

1. Encourage OER use in high-enrollment, general education courses
2. Ensure all designated SUNY OER Courses keep that designation for 3 years
3. Report data about SUNY OER Courses back to system administration

These three conditions, especially the last two, provide for student-level transparency in terms of OER use and provide for an organized method for on-going collection of data to report to the New York State Office of budget.

IMPLEMENTATION

One of the few tools common across all SUNY campuses is [SIRIS](#), the SUNY Institutional Research and Information System. SUNY utilizes SIRIS to provide data across a wide variety of course elements, including success and retention rates. SIRIS was a logical fit to begin to capture OER usage

and effectiveness data across the otherwise disparate system. A SIRIS OER code was designated, and implementation instructions have been distributed to all participating OER Program campuses. The designator was specific to OER, rather than low-cost or other Zero Textbook initiatives, due to the emphasis on OER in New York State funding initiatives.

The SIRIS code and methodology was designed by SUNY Information Technology Exchange Center (ITEC). It is important to note that the OER code or designation is for administrative purposes. In other words, this code is for back-end data reporting, and not visible to faculty or students. Campus technology staff at individual SUNY institutions adopt this [coding process](#) into the data reporting structure. Once established, courses can have the OER code applied to them at any point in the semester or after the semester has concluded.

SUNY System Administration is moving towards the requirement of all SUNY OER Courses designated in SIRIS in order to receive continued OER funding. Acknowledging that the implementation procedure moves at different speeds at different campuses, there is a three-year window towards implementing this requirement. By the 2019-20 academic year, SIRIS will be the only official OER Course reporting mechanism for campus OER funding allocations.

Since the same campus units who are responsible for SIRIS reporting also tend to manage course registration systems, implementing a forward-facing OER course designation was a natural companion conversation at many SUNY schools

CHALLENGES AND LESSONS LEARNED

Even though the mechanism for adding the OER code to SIRIS is relatively straightforward, the intention behind when and how it is used needs to be well-planned. This becomes even more true when forward-facing course designators are also added into the equation.

Questions that SUNY campuses raise as important to address with both SIRIS and SIS OER Course designation markers include:

- Who is responsible for marking courses in SIRIS and SIS?
- Who vets courses that are marked, to ensure they meet the criteria?
- How early in scheduling will SIRIS and SIS course designations need to be applied?
- How is the language of SIS markers determined?
- How is the language of SIS markers communicated across campus?
- How will the SIRIS and SIS marking process be replicated from semester to semester?

Decisions to mark OER course sections for public, or student-facing viewing during course registration process should always be a campus based decision involving the appropriate level of input from all stakeholders, administration, faculty, staff, shared governance bodies and as necessary, labor unions.

Inasmuch as OER Champions drive the adoption, adoption and creation of OER on SUNY campuses the burden to track, record and report all OER sections every semester should not fall to one person.

Consideration should be given to other existing systems in place requiring unique course attributed (modality, alternative schedules, etc.) and campuses, to the best of their ability, should seek to replicate those processes to reduce manual labor in marking OER course sections.

CHAPTER 6.

OREGON

AMY HOFER

COURSE MARKING DRIVERS

Oregon's [HB 2871](#) passed in 2015. The bill includes a requirement that each public college and university designate no-cost and low-cost courses in the schedule.

IMPLEMENTATION

Oregon's 24 colleges and universities are not in a system. This means that each institution develops their own implementation based on considerations such as available staff time, existing procedures to enter course information in the online schedule, and which student information system is in use.

Likewise, there is not a statewide definition for "low-cost." For most institutions the low-cost threshold is \$40, but at some schools the threshold is higher or lower. There also is not a single statewide policy on what is included or not included when calculating cost. A recommended starting point for making decisions is the [Material Costs in the Schedule FAQ](#), created by the OER Steering Committee at Portland Community College.

Three exemplary implementations at Portland Community College, Mt Hood Community College, and Treasure Valley Community College are described in the archived webinar [OER Designations in the Schedule: System Considerations](#).

CHALLENGES AND LESSONS LEARNED

Aggregated data from the 2017-19 biennium show that with 19 out of 24 institutions reporting, courses with the no-cost and low-cost designation in the schedule are estimated to have saved over 375,000 students (by headcount) in 21,000 course sections approximately \$34 million in two academic years. At the reporting institutions, approximately 12% of all courses were designated no-cost or low-cost. Because of differences in implementation and reporting methods, this number may more accurately be thought of as cost avoidance rather than actual student savings.

More information on each college and university reporting savings data using the method that works best for their own local campus environment can be found in the post [Support for a Local Approach to Statewide OER Data Collection](#). More information on the statewide estimated student savings can be found in the post [Estimated 2017-19 Student Savings in No-Cost/Low-Cost Courses](#).

One year after the pilot phase of the schedule designation ended, University of Oregon students evaluated the statewide implementation for their Master of Public Administration Capstone. They found that few students were aware of their college or university's efforts to designate no-cost/low-cost courses in the schedule. It is hoped that the 2019 legislation requiring each college and university to develop a textbook affordability plan that includes marketing the schedule designation to students will address this issue.

The capstone study also identified the timing of faculty course materials adoption reporting as a potential snag in the system. Students need course material cost information to be available when registration opens if the no-cost/low-cost schedule designation is to provide meaningful information that students can use to inform course selection. Oregon has convened a work group to examine this issue during the 2019 short legislative session. Full findings and recommendations from the UO capstone study are available via [Evaluating Oregon's Open Educational Resources Designation Requirement](#).

CHAPTER 7.

TEXAS

MICHELLE REED

COURSE MARKING DRIVERS

I've worked at the University of Texas at Arlington (UTA) for the last three years as Open Education Librarian and was recently promoted to the leadership team as Director of Open Educational Resources following a [half-million-dollar investment in OER](#) from university administration. It was in my first year as Open Education Librarian that the Texas Legislature passed [Senate Bill 810 \(SB810\)](#), which requires institutions of higher education across the state to provide searchable information to students about OER-only courses. A strong definition of OER was provided:

“teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that allows for free use, reuse, modification, and sharing with others, including full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge.”

However, Texas was not given a very long implementation window. The bill passed in June 2017, effective immediately, with a compliance deadline of Spring 2018. We in higher education know a change of this scope, and impacting as many stakeholders as course marking does, takes longer. A recent survey commissioned by the Digital Higher Education Consortium of Texas (DigiTex) and administered in May 2019 shows only 59 respondents of the 158 two-and four-year institutions that received the statewide survey have a course marking solution in place. The findings were presented in [Open Educational Resources \(OER\) in Texas Higher Education, 2019](#).¹

1. Jimes, C., Karaglan, A., Petrides, L., Rios, J., Sebesta, J., & Torre, K. (2019). *Open Educational Resources (OER) in Texas Higher Education, 2019*. Austin, TX: Digital Higher Education Consortium of Texas and Texas Higher Education Coordinating Board; Half Moon Bay, CA: Institute for the Study of Knowledge Management in Education.

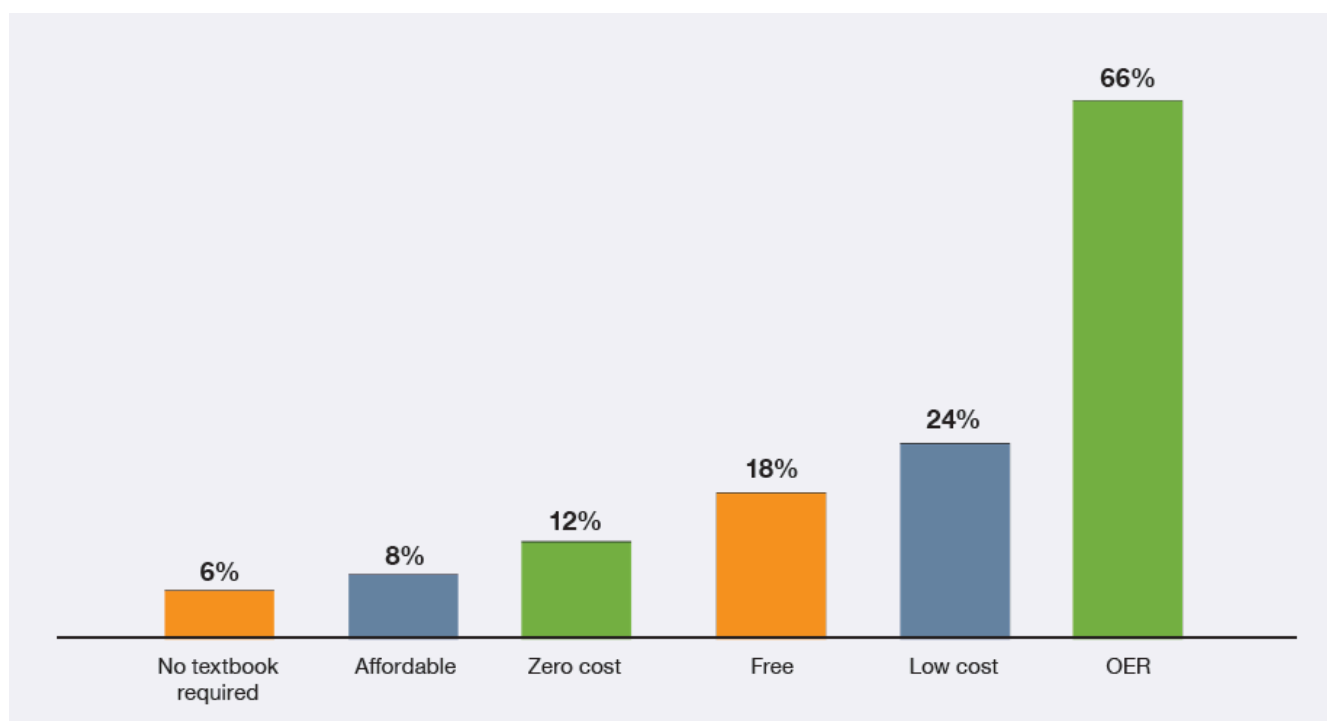


Figure 7.1: Texas OER landscape survey results show terms used in course schedules

IMPLEMENTATION

Locally, we implemented a quick and free solution that reflects the constraints of system capabilities, no financial support, and a local directive to vet every course to be tagged. Based on what was feasible in the short term and conversations with key stakeholders (i.e., registrar, early OER adopters, curriculum coordinators, student representatives, and the campus store), we incorporated an “educational resources cost” option into an existing “course attribute” drop-down menu under the system’s advanced search options.

Search for Classes
Enter Search Criteria

Search for Classes

Institution: University of Texas, Arlington
Term: 2198

Select at least 2 search criteria. Select Search to view your search results.

Class Search

select subject Subject

Course Number is exactly

Course Career

☒ Show Open Classes Only
☐ Open Entry/Exit Classes Only

Additional Search Criteria

Meeting Start Time greater than or equal to

Meeting End Time less than or equal to

Days of Week include only these days

☐ Mon ☐ Tues ☐ Wed ☐ Thurs ☐ Fri ☐ Sat ☐ Sun

Instructor Last Name begins with

Class Nbr

Course Keyword

Minimum Units greater than or equal to

Maximum Units less than or equal to

Course Component

Session

Mode of Instruction

Campus

Location

Course Attribute

Course Attribute Value

Educational Resources Cost
Honors Course
Lab Safety Training Required
Service Learning Designation

Clear Search

Figure 7.2: Option to select “Educational Resource Cost” from Course Attribute

The attribute is associated with one of two “values” (“free” or “low-cost”). The low-cost threshold was set at \$25 for all required course materials based on informal student feedback and [market information](#).

Search for Classes
Enter Search Criteria

Search for Classes

Institution: University of Texas, Arlington
Term: 2198

Select at least 2 search criteria. Select Search to view your search results.

Class Search

select subject Subject:

Course Number: is exactly

Course Career:

☒ Show Open Classes Only
☐ Open Entry/Exit Classes Only

Additional Search Criteria

Meeting Start Time: greater than or equal to

Meeting End Time: less than or equal to

Days of Week: include only these days

☐ Mon ☐ Tues ☐ Wed ☐ Thurs ☐ Fri ☐ Sat ☐ Sun

Instructor Last Name: begins with

Class Nbr:

Course Keyword:

Minimum Units: greater than or equal to

Maximum Units: less than or equal to

Course Component:

Session:

Mode of Instruction:

Campus:

Location:

Course Attribute: Educational Resources Cost

Course Attribute Value

- Free Educational Resources
- Low Cost Educational Resources

Search

Figure 7.3: Option to select “Free Educational Resources” from Course Attribute Value

These filters are not easy to find when searching the schedule of classes, though placement in the course planner, which many students use, is more visible. Additionally, fliers distributed to students and advisors provide information about [locating courses tagged as free and low-cost](#).

Schedule Planner Text Only

Add Course

By Subject Search by Course Attribute

Attribute

Subject

Course

Select Attribute

- Free Educational Resources
- Honors Course
- Lab Safety Training Required
- Low Cost Educational Resources
- Service Learning Designation

Figure 7.4: Option to select “Free Educational Resources” from the Schedule Planner

Still, the quality of this search feature hinges on the quality and timeliness of reported data. Due to limitations and inaccuracies in the campus store’s platform for course material submissions, Follett Discover, a separate [form](#) was created using Qualtrics and is maintained by libraries staff. Both

units contributed to the Libraries' [Report Resource Use guide](#), which presents reporting deadlines, guidelines, and additional information.

CHALLENGES AND LESSONS LEARNED

Developing reporting policy and procedures for those actually making the decisions about the course materials selected for UTA classes is significantly more complex than the process of creating a new designation. The successes we've had are the result of the following:

1. University administration's willingness to communicate with all faculty and staff about reporting requirements and deadlines, as well as the accessibility and affordability reasons early and accurate reporting is important for our students' success.
2. Collaboration and information sharing between the libraries, campus store, and registrar.
3. Involvement of OER advocates actively engaged in outreach with OER adopters to improve what is a traditionally (due to no perceived need) under-reported type of course material.

Many challenges remain. Our limited implementation options in the short term yielded a buried search filter. Additionally, the manual vetting process presents serious sustainability and labor issues. The recent OER investment from university administration creates opportunities for improving reporting processes, search and display usability for students, and data accuracy.

Finally, legislative expectations may conflict with academic culture, which can result in the need to implement short-term solutions while exploring sustainable long-term strategies. These conflicts can remain long after implementation, as the legislative requirement of making course information available at the time of registration shows itself largely incompatible with academic timetables for assigning instructors and granting access to courses within the learning management system where course material selections may be reported.

CHAPTER 8.

WASHINGTON

BOYOUNG CHAE

“Let the DATA drive: Washington community & technical college’s journey to establish OER and Low-Cost labels” was previously published at [WCET Frontiers](#) by Mark Jenkins & Boyoung Chae, [CC BY NC SA](#).

COURSE MARKING DRIVERS

In Washington State, the State Board for Community and Technical Colleges (SBCTC) is the coordination agency for system policy, shared resources, and collaborative initiatives. SBCTC’s OER initiative, which has been underway for nearly a decade, is a key component of our system’s ethos of resource sharing as a way to support colleges’ efforts to make high quality, affordable curriculum available to all students. In SBCTC’s Education Division, the Office of Educational Technology and Open Education is charged with developing the infrastructure of research, policy, and process to support these efforts.

The rich collaboration between the agency and the colleges has resulted in a highly motivated community of practice made up of thousands of faculty, staff and student advocates for OER, and textbook affordability across the state.

IMPLEMENTATION

STUDY 1. ASSESSING THE NEEDS

At SBCTC, efforts have focused on a multi-layered research program designed to ensure that our system-wide initiatives are deeply rooted in data-driven insights about what students and colleges need to promote success in open education. A comprehensive study of perceptions of OER in our system in 2015 revealed remarkable findings that continue to drive SBCTC OER initiatives.

Class Search

Search Options

* Term
WINTER 2019

Subject
Select Subject

Catalog #

Class Number
e.g. 1136

☒ Show Open Classes Only

Course Attribute
Any Course Attribute

- Any Course Attribute
- Instructional Assistance
- Low-Cost Textbooks
- OER: No Textbook to Purchase

*Required

Figure 8.1: Class search page from Tacoma Community College in Washington

One of the most important findings to emerge from this research indicated that students were finding it difficult to consistently locate courses using OER or other affordable materials. The means to identify and mark those classes at or before the point of registration have been beyond the capacity of many colleges. Because of this, OER based and affordable classes were not consistently supporting students' ability to manage cost by making informed choices. Moreover, definitions and standards for OER and affordability varied across the system.

STUDY 2. ESTABLISHING A POLICY FOR OER LABELING

In 2016, this insight led to a second study. SBCTC, with the help of system governance and student groups throughout the state, sought to identify consensus definitions and criteria for labelling OER-based courses in a consistent manner across all 34 colleges. The research led to a statewide policy for coding such courses. Soon after these codes were created, legislation passed in Washington state requiring OER information to be available at the time of registration. With the OER Code already

established as policy by SBCTC, colleges were well-prepared to implement the requirement set forth in the statutes ([E2SHB 1375](#) & [RCW 28B.50.789](#)).

STUDY 3. ESTABLISHING THE THRESHOLD FOR LOW-COST LABELING

During the implementation of the OER code, it became evident that the goal of informing student choice could best be fulfilled by enabling them to also identify courses that used affordable course materials, such as library materials, inexpensive textbooks, regardless of whether or not those materials included OER. Consequently, a new code was proposed to tag courses using low-cost materials. The first step in developing a low-cost code and policy required SBCTC to understand how students would define low-cost and to propose a threshold value for affordability.

In partnership with the Washington Community & Technical Colleges Student Association (WACTCSA), SBCTC created a [survey](#) to define the threshold. Based on responses from over 10,000 students statewide, the plurality choice for the low-cost threshold is \$50 or less.

These findings were discussed by college executive staff in system governance commissions and the \$50.00 threshold was approved and added to the state coding manual.

STUDY 4. ESTABLISHING A POLICY FOR LOW-COST LABELING

With the Low-Cost threshold identified, SBCTC surveyed faculty and staff in April 2018 to gather feedback on the implementation guidelines for the Low-Cost code. A total of 630 faculty members and college administrators responded. The [report](#) released the results of the survey and shares the revised name and criteria based on the feedback received.

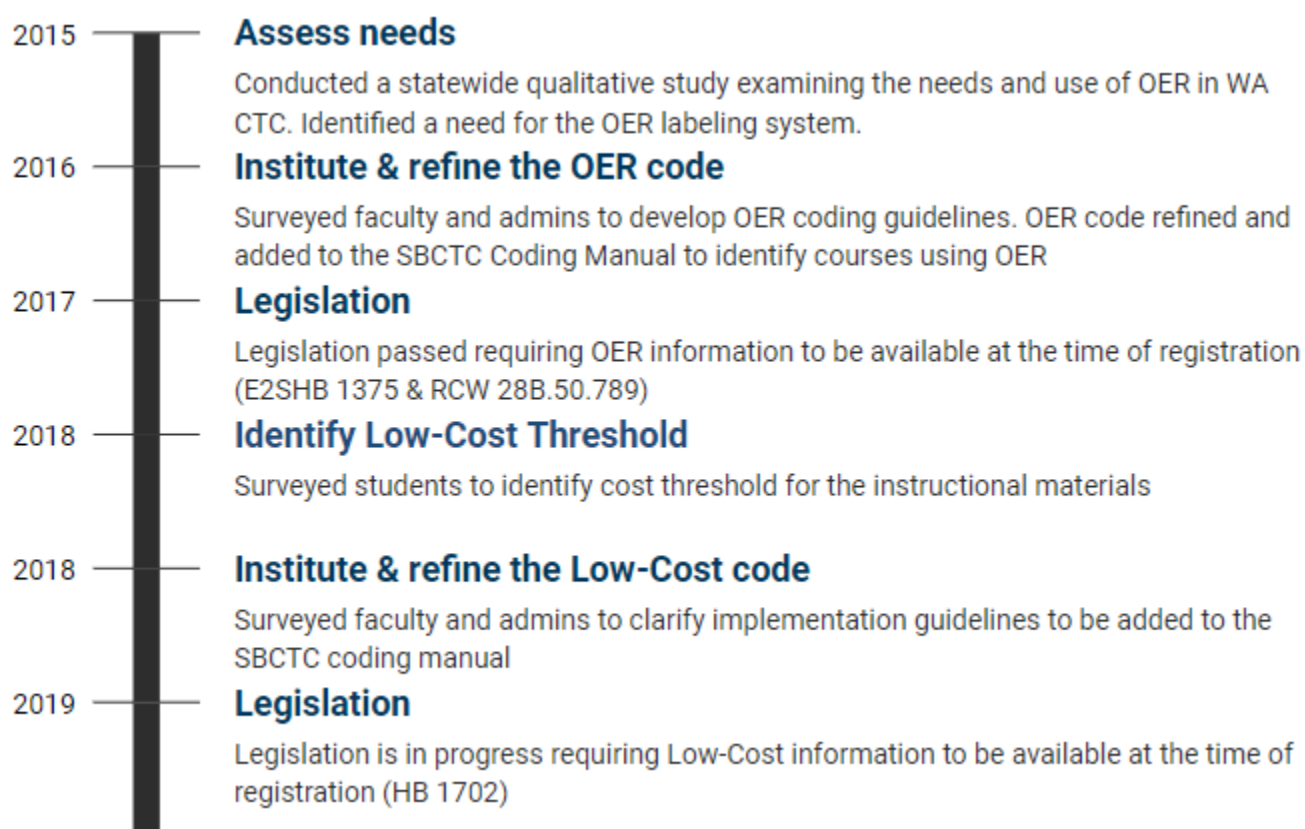


Figure 8.2: Washington community and technical colleges' journey in establishing OER and Low Cost code

CHALLENGES AND LESSONS LEARNED

Through the process, we have learned and experienced the benefits of using a data-driven approach. It helped us overcome and prevent major barriers, such as evaluating the usability of policy, involving stakeholders and promoting the policies. Specifically, it helped us build more relevant and usable policy: The data-driven process described above helps meet key stakeholders –faculty, administrators, and students — where they are, in real time. Policy guidelines should be evaluated by its relevance and usability in actual teaching practice. This can only be achieved with careful observation of these practices that is informed by robust data collection.

It also helped us properly involve stakeholders: A brand-new course labeling system could be perceived as an onerous imposition on faculty members and college administrators. Providing opportunities for the faculty, administrators, and students to participate in the research from the beginning gives them a sense of ownership and collective responsibility.

Finally, it helped us promote the policy: When each process is documented in the form of a research finding, it enables better communication about progress to stakeholders. It is easy to show the logical relations between the steps and how each step informs the next.

In the end, establishing a brand-new coding system for a non-traditional and evolving domain such as OER could be a daunting task for any system. However, when data guides the process, it can help maintain focus on the goal and form productive relationships with stakeholders. Data can also provide the strongest possible platform for informed decision making.

LINKS BY CHAPTER

GEORGIA

Complete College Georgia (<https://completegeorgia.org/>)

Affordable Learning Georgia (<https://www.affordablelearninggeorgia.org/>)

designators (https://www.affordablelearninggeorgia.org/about/course_catalog_designators)

Designation FAQ (<http://tinyurl.com/designationfaq>)

NEW YORK (CUNY)

library's website (<http://www2.cuny.edu/libraries/open-educational-resources/guidelines-for-zero-textbook-cost-course-designation/>)

NEW YORK (SUNY)

SIRIS (<http://system.suny.edu/institutional-research/>)

coding process (https://docs.google.com/document/d/1Zk7BDSFbqzw-6vL_4025W4ArxYlsIQta2fzk_SHUCSw/edit)

OREGON

HB 2871 (<https://olis.leg.state.or.us/liz/2015R1/Measures/Overview/HB2871>)

Material Costs in the Schedule FAQ (<https://docs.google.com/document/d/13JiRACnJ6u4zgeH7kvsTL2HK3ET711C3cgt2txHE5b0/edit?usp=sharing>)

OER Designations in the Schedule: System Considerations (<https://openoregon.org/archived-webinar-oer-designations-in-the-schedule/>)

Support for a Local Approach to Statewide OER Data Collection (<https://openoregon.org/local-data/>)

Student Savings in No-Cost/Low-Cost Courses (<https://openoregon.org/estimated-2017-19-student-savings/>)

Designation Requirement (<https://openoregon.org/evaluating-oregons-open-educational-resources-designation-requirement/>)

TEXAS

half-million-dollar investment in OER (<https://www.uta.edu/news/news-releases/2019/10/01/library-oer>)

Senate Bill 810 (SB810) (<https://capitol.texas.gov/billlookup/History.aspx?LegSess=85R&Bill=SB810>)

The Landscape of Open Educational Resources at Texas Institutions of Higher Education (<http://60x30tx.com/media/1523/3-the-landscape-of-oer-at-texas-institutions-of-higher-education-iskme-final.pptx>)

market information (<https://library.uta.edu/scholcomm/blog/mythbusting101>)

locating courses tagged as free and low-cost (<https://libguides.uta.edu/students/MyMav>)

form (https://libguides.uta.edu/ld.php?content_id=49281320)

Report Resource Use guide (<https://libguides.uta.edu/utacares/report>)

WASHINGTON

WCET Frontiers (<https://wcetfrontiers.org/2019/03/21/wa-sbctc-oer-and-low-cost-codes/>)

CC BY NC SA (<https://creativecommons.org/licenses/by-nc-sa/4.0/>)

E2SHB 1375 (<http://app.leg.wa.gov/billsummary?BillNumber=1375&Year=2017>)

RCW 28B.50.789 (<http://app.leg.wa.gov/RCW/default.aspx?cite=28B.50.789>)

survey (<https://tinyurl.com/wa-students2>)

report (<https://tinyurl.com/lowcost-survey2>)