This plan was submitted by Academic Affairs, for review and feedback, to the following leadership councils on the dates listed below.

Faculty Senate – January 24, 2022
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Leadership Council – April 20, 2022
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Plan to Increase Access and Affordability of Instructional Materials

June 1, 2022
OPEN EDUCATIONAL RESOURCES
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INSTITUTIONAL PROCESS
In response to the expectations set forth by the Idaho State Board of Education Policy III.U. Instructional Material Access and Affordability, Idaho State University (ISU) formed an Open Educational Resources (OER) Committee in September of 2021 to develop a plan to increase access and affordability for instructional materials. This standing committee consists of one faculty member representative from each college as well as representatives from Academic Affairs, the ISU Libraries, the Instructional Technology Resource Center (ITRC), and Faculty Senate. Committee members participated in 10 meetings over the course of the Fall 2021 and Spring 2022 semesters. Additionally, they conducted two surveys to gather foundational OER data. The first survey, distributed to all ISU Instructors in November of 2021, was formed in order to gauge instructor knowledge, interest, and current usage of OER materials. Over 300 instructors responded to this survey. The second survey was sent to all university departmental chairs and program directors in February of 2022. This survey was designed to determine which departments would potentially benefit most from OER initiatives, and included questions which focused on each department’s high enrollment courses. Based on the information gathered in these surveys, OER Committee discussions, and feedback from the Faculty Senate, Dean’s Council, Leadership Council, Administrative Council and individual faculty from across campus through numerous forums, ISU is submitting the following plan to increase access and affordability of instructional materials for all students.

ACCESS AND AFFORDABILITY OF INSTRUCTIONAL MATERIALS OVERVIEW
Open Educational Resources (OER) are free, openly licensed textbooks and other course materials, and adopting these materials for use in higher education has a powerful effect on student success rates. A recent meta-analysis on OER adoption studies shows that, on average, courses which use open textbooks have a 29% lower withdrawal rate in comparison to courses with commercial textbooks (Clinton & Khan, 2019). Benefits appear even stronger for Pell-eligible, non-white, and part-time students, and may result in grade improvements for these populations (Colvard et al., 2018; Delgado et al., 2019). Notably, adopting OER has been shown to result in learning efficacy comparable to commercial textbooks (Clinton & Khan, 2019; Grinias & Smith, 2020). Instructors generally perceive the quality of their selected OER as at least equivalent to the quality commercial textbooks (Allen & Seaman, 2014).

Recent studies have concluded that the price of course materials can negatively impact student success. A 2018 survey of over 21,000 university students revealed that around 23% dropped, 18% withdrew from, and 17% failed a course because they were not willing or able to purchase course materials (Florida Virtual Campus, 2019). Textbook costs also
limit the number of courses students can afford to take per semester, and may cause them to delay taking certain courses (Florida Virtual Campus, 2019; Martin et al., 2017; Senack, 2014). It is critical that affordable materials are available for Early College classes, and particularly rural high school students, who are highly unlikely to be able to afford textbooks and other learning materials.

Although there is strong evidence in favor of OER adoption as a student success and retention measure, OER is still not widely used in higher education. Unlike previous technological advances in education, however, OER has no entrenched groups of opposition or factions with powerful objections (Allen & Seaman, 2014) so adoption is on the rise (Spilovoy, Seaman & Ralph, 2020). However, barriers to faculty adoption are significant and include:

- lack of time and expertise to search for and evaluate relevant OER offerings;
- low awareness and understanding of OER;
- lack of time to develop or update courses to incorporate OER;
- inadequate institutional resources or support to pursue OER work (Belikov & Bodily, 2016; Seaman & Seaman, 2018); and
- lack of professional recognition for doing so in promotion and tenure processes (Skidmore & Provida, 2019).

When Belikov & Bodily (2016) asked about incentives to overcome these barriers, faculty named more institutional support for OER, such as, course load reduction, research assistance, or monetary compensation. Another necessary incentive is professional recognition: OER work is currently undervalued in higher education, and faculty are reluctant to take on this work out of concern it will not be recognized by evaluation processes or promotion and tenure guidelines (Skidmore & Provida, 2019).

Seaman & Seaman (2020) concluded that faculty who are aware of institutional or state/regional OER initiatives are three to four times more likely to undertake an OER adoption program. OER adoption is frequently financially incentivized by grant programs, including federal, regional, state and institutionally funded grants, and faculty development structures include training opportunities offered by libraries and/or centers for teaching excellence (McGowan, 2020). For example, in 2021, the Idaho Legislature invested $1 million into Project Z-degree. This state-funded initiative was created to help community college faculty transition their courses to low or no-cost course materials, increasing access and affordability for their students. By pursuing similar initiatives, ISU can make these same benefits available to the university’s students.
STRATEGIES TO INCREASE ACCESS AND AFFORDABILITY  
OF INSTRUCTIONAL MATERIALS

This plan offers eight strategies to enhance the use of OER and low cost materials by Idaho State University faculty. These strategies build on programs, resources, and incentives currently in place at ISU and are intended to be continued or launched variously during the Spring 2022 semester and the following academic year. The recommendations focus either on cost minimization or on faculty support and are listed below.

1. **Continue to Support Existing OER and Low Cost Resources and Incentives**  
   
   ISU recently developed two university-wide professional development opportunities related to OER and low cost materials; ISU’s Open Education Week and the Program for Instructional Effectiveness (PIE) OER Symposium. Additionally, the University Libraries, the Instructional Technology Resource Center (ITRC), Disability Services, and the Idaho State Board of Education all offer numerous resources and support for faculty in order to increase access and affordability of instructional materials.

   The first ISU Open Education Week was held in March 2021 and the second offered in March 2022. This event is intended to be offered as an annual event. It was organized by a committee within ISU University Libraries known as the Open and Affordable Educational Resources (OAER) Committee, made up of both librarians and instructional designers. The week’s educational programming has consisted of virtual presentations given by recent Textbook Hero Honorees (see below), and additional educational presentations about discovering OER, using H5P interactive learning software, and OER basics. Videos of the events are available on the ISU Libraries YouTube Channel.

   Following the first round of OPAL Fellowship grants awarded by the Idaho State Board of Education, the PIE program hosted a symposium in March 2020 for the ISU fellows to share their experiences. This symposium is intended to be offered on a biennial basis.

   ISU University Libraries has provided a Subject Guide for instructors interested in learning more about OER. Topics covered in the guide include OER basics, a beginner’s guide to searching OER, resources for creating and adapting OER, and other affordability strategies such as using electronically licensed library materials. The Guide also contains a contact form to request OER search help, a list of previous Textbook Heroes and a link to the ISU Pressbooks catalog of open textbooks. Librarians consult with faculty members to identify existing items in collection whose copyright status and/or licensing terms permit use suitable for a class. Additionally, individual items with Digital Rights Management properties permitting class use are added to the collection where feasible. The University Libraries continues to revise job descriptions where feasible to include Open and Affordable ER support skills and knowledge.

   The Instructional Technology Resource Center (ITRC) provides accessibility support for all faculty associated with all of their instructional materials. This support includes captioning of videos and review of instructional documents to assure they are completely
accessible for students through the use of screen reader tools. ITRC supports faculty who are working with students with other vision limitations such as, but not limited to, color blindness or the ability to discern contrasts. These services are purposefully coordinated with online faculty and online courses as part of ISU’s Quality Assurance processes, Quality+, also these same services are available to any faculty teaching in any mode, including face-to-face.

In addition to reviewing and assisting with the accessibility of instructional materials, the ITRC staff, along with the Universities Library staff, assist faculty with obtaining digital instructional materials that faculty can utilize legally within their courses or share with their students through ISU’s LMS. The ITRC supports faculty as they work to increase access and affordability for instructional materials.

The Disability Services office provides accessibility support for all students with disabilities at all campuses and for those attending classes via distance methods. Support includes but is not limited to transcription services, Braille, large print materials, sign language interpreting, books in etext format with text to speech software, speech to text software, note taking software and other note taking tools, screen and text magnifiers, readers, note takers, and scribes. Disability Services is also the sponsoring organization for ISUPP 1020 - Electronic and Information Technology Accessibility which specifically delineates the expectations regarding accessible instructional materials at ISU.

The Idaho State Board of Education provides the Pressbooks publishing platform for ISU faculty, staff and students. This resource allows the creation and distribution of open educational resources, as well as free materials under traditional copyright. ISU members interested in publishing any materials and making them free online can contact the ISU Pressbooks administrator for an account. The ISU Pressbooks Catalog displays publications created or curated by ISU users that they have chosen to make publicly available on the web.

Timeline and Outcomes:

ISU will continue to offer professional development opportunities, resources, and support for faculty in order to increase access and affordability of instructional materials.

2. **Update University Class Registration System to Include Course Markings**

Course marking initiatives are projects to update university registration systems by including an indicator of the cost of required materials in their course schedules. These markings can help students plan for textbook costs by allowing a price filtering option within a registration system, so students can select the classes that best meet their financial needs. A number of major universities and university systems in the U.S. have undertaken similar projects, as described in *Marking Open and Affordable Courses: Best Practices and Case Studies*. 
To achieve this, the Idaho State University Office of the Registrar will begin collecting material cost information from departments when they submit their course schedules. They will program the system to display material costs in the course schedule by price bands, and create a search filter on this attribute in the program’s user interface. The ISU registration process will utilize the following three definitions developed by Idaho State Board of Education in Board Policy III.U.:

i. “Zero cost” means a total materials list price of $0.
ii. “Very low cost” means a total materials list price of $1-$30.
iii. “Low cost” means a total materials list price of $31-$50.

The ISU registration process will further include a course marking process that indicates course sections that require the purchase of any access codes for instructional materials.

Timeline:
The ISU Registrar projects that this project will be completed for registration for the Spring 2023 semester. The implementation will take place during Summer 2022 in order to ensure the system is ready for the Spring 2023 registration process which begins in September of 2022.

Outcomes:
• Course markings will be available and searchable beginning with the Spring 2023 course schedule.

3. Promote and Support the Inclusion of OER and Affordability Work in Evaluation and Promotion Guidelines

Instructors may be reluctant to undertake affordability projects if they do not believe the work will be seen as valuable in evaluation processes or promotion and tenure guidelines (Skidmore & Provida, 2019). To make it feasible for instructors to undertake OER and affordability projects on a widespread basis, this work must be valued by existing faculty evaluation processes.

OER advocates have consistently recommended that these evaluation processes be revised to place more emphasis on affordability work, and have created resources to help universities that wish to follow this path. For example, the Open Education in Promotion, Tenure & Faculty Development Project is one such initiative that provides resources on this topic, including examples of policies at other universities that may begin conversations about how similar policies might be adapted to ISU’s needs and environment.

ISU’s OER Committee is well positioned to raise these issues in the appropriate venues and share resources related to the inclusion of OER and affordability work in promotion and tenure and evaluation guidelines. Members of ISU’s OER Committee will provide educational presentations and other resources to the Faculty Senate, including the Faculty Professional Policies Council (FPPC) and their Promotion and Tenure subcommittee, and they will connect this work to ISU’s mission. The OER Committee will make similar
presentations to university deans and department chairs in appropriate venues. Informal follow up conversations will take place as necessary to determine whether any changes in policy are appropriate.

**Timeline:**
Outreach to Faculty Senate, Faculty Professional Policies Council, Dean's Council, and department chair meetings will begin to take place during the 2022-2023 academic year. Follow-up conversations will be conducted at appropriate intervals to determine whether policies and processes should be updated.

**Outcomes:**
- Educational materials and resources will be available across campus for those interested in incorporating OER into promotion and tenure and annual evaluation guidelines.
- A minimum of two presentations will be provided to leadership groups each semester in order to determine whether policies and processes should be updated surrounding OER.
- Faculty Senators and departmental leadership will have increased knowledge of OER and affordability benefits, and the resources necessary to incorporate affordability work into university and department-level promotion and tenure and annual evaluation guidelines, should they choose to do so.
- The OER Committee will stay aware of any policy changes related to OER and affordability work in promotion and tenure or annual evaluation guidelines.

**4. Identify Courses With High Return on Investment**

High enrollment introductory general education courses provide the highest return on investment when OER is adopted. At ISU, data on current OER usage within these courses is extremely limited and incomplete. To ensure a high return on OER funding investments, a helpful first step will be to identify courses where OER projects can be implemented across sections to benefit the most students.

Students take general education and 1100-level courses to satisfy objectives or to try new subjects they have not yet committed to studying. In addition to providing the highest total cost savings, OER projects that target high-enrollment courses with multiple sections can give students the flexibility to try new subjects without committing to high-cost textbooks, many of which are bundled with digital access codes and cannot be resold. (Note: some OER textbooks come with ancillary materials such as slide decks, study guides and test banks, similar to the material available via access code from their commercial counterparts. OpenStax is an example of an introductory textbook publisher that makes ancillary materials freely available to instructors and students.)

At ISU, several successful OER adoptions have occurred at the department level or across multiple sections of high-enrollment courses. Notable OER success stories include a recent department-led update of all Sociology 1101 sections to use an OER textbook, and a similar redesign across all sections of ART 1101.
To identify further opportunities, a survey of department chairs was conducted in Spring 2022 to pinpoint high-enrollment courses within departments that may be candidates for OER use in multiple sections. This survey data will be utilized to target courses and departments for potential OER discussions.

To provide a better understanding of OER usage across campus, higher-quality data collection (e.g., drop/fail/withdrawal rates across disaggregated populations) will occur in conjunction with the new course marking scheme to be implemented for Spring 2023.

**Timeline and Outcomes:**

- ISU’s departmental survey highlighted possible OER opportunities which will provide a high return on investment.
- Institutional Research will gather data on OER usage at ISU to determine current adoption rates and help set benchmarks and goals for future growth.
- Student cost savings from OER usage will be calculated as one measure of OER impact.

5. **Address Common Misconceptions about OER with Instructors and Administrators**

In a 2021 survey sent out to ISU instructors, 85.76% of respondents (n=309) said that they were either somewhat familiar or very familiar with the definition of OER. However, despite a baseline level of familiarity, many misconceptions about OER remain and were reflected in the open-ended survey comments, and may prove to be obstacles to greater OER adoption at ISU. OER awareness activities at ISU will place a high priority on addressing these misconceptions and should actively provide information addressing them.

**Academic Freedom**

A common misconception about OER initiatives is that they are an effort to limit the course materials instructors can select. Although OER has many benefits, it is not an appropriate choice for every course. Clearly, there are many courses where traditional commercial textbooks are, and will continue to be, the best choice. ISU instructors must retain their current level of academic freedom to select the best course materials for their students. The goals of OER initiatives at ISU will be to raise awareness of the benefits of OER, and support interested instructors and departments in pursuing OER and affordability projects if they wish to undertake this work.

Efforts to address this misconception will include information about how OER enables academic freedom and pedagogical flexibility, since openly licensed materials can be remixed, changed and updated. OER materials can be updated to be context-dependent and to make materials more inclusive, empowering instructors and increasing representations of diversity in course materials, as described in the "Centering Diversity and Inclusion" chapter of the Iowa State University OER Starter Kit.
Quality Concerns
Another common misconception is that because OER textbooks are low-cost or free, their creators were not compensated for the intellectual work required to create them, and they are subsequently of low quality (frequently expressed as “you get what you pay for”). In reality, many national, state, regional, and institutional grants exist to enable the creation of OER, and many of these grants provide for, and even require, a peer review process to take place once the OER is created. For example, Chippewa Valley Technical College was awarded a grant from the U.S. Department of Education to create their OpenRN nursing OER program, which provides for a peer review process by faculty, deans, industry members, and students.

In addition to messaging efforts, “OER Basics” trainings that address these common misconceptions will be offered on a regular basis.

Timeline and Outcomes:

• Two “OER Basics” trainings will be held over calendar years 2022-2023. OER Basics trainings may incorporate material from the Open Education Network membership provided by the Idaho State Board of Education.

• Faculty surveys and other similar tools will be used regularly to determine the continued presence of OER misconceptions on campus.

6. Encourage the Adoption of Affordability Values for Faculty and Administration

Thus far, OER work at ISU has been pursued by motivated faculty members, librarians, instructional designers, and individual departments. However, widespread adoption of OER in higher education requires not only advocates in the classrooms but also support from university leadership, including the development of a culture that values affordability and “accessibility” in education.

ISU has set forth the need to provide “diverse pathways to retention and graduation through educational preparation, academic and co-curricular opportunities, and extensive student support services” in its designation for Core Theme Two: Access and Opportunity. To facilitate the meeting of this goal and to help meet the desired impact, OER initiatives and events held at ISU must enjoy strong support from university leadership. An active and concerted commitment from ISU leadership to promote such initiatives and events will be a strong aspect of their success.

To increase support for this work at ISU, it is also important to continually promote the successes of existing OER initiatives and projects, which includes measuring and sharing metrics about their impact on students. The Textbook Heroes Honor initiated in 2020 by the Universities Libraries and their Open and Affordable Educational Recourses (OAER) Committee is an example of recognizing faculty for their OER accomplishments, however, limited data have been gathered on the impact of OER projects to date. ISU’s
Institutional Research department is well positioned to gather data on the impact of affordability projects, and will regularly measure and report on the impacts such projects have on students.

Timeline and Outcomes:

- Education and resources about the benefits of OER will be made widely available to faculty and those in leadership positions.
- Two “OER Basics” trainings will be held over calendar years 2022-2023. An OER Basics training may incorporate material from the Open Education Network membership provided by the Idaho State Board of Education.
- ISU’s Institutional Research will track student outcomes for courses that adopt OER or undertake affordability projects on a semesterly basis, and report the disaggregated data for drop/fail/withdrawal rates and other key metrics as appropriate.
- Tools such as surveys will be used to determine the adoption of affordability values in ISU leadership and instructors.
- Outcomes of OER initiatives, including data on student impacts, will be widely shared and presented to university and faculty leadership annually, to increase the profile of OER work on campus.

7. Continue the Proposal-Based Program for Course Material Affordability Projects

OER and course material affordability programs frequently follow a proposal-based model in which instructors apply for funding and professional development resources to enable them to complete their proposed projects. This type of model allows the flexibility to accommodate different types of projects, while directing funds to projects which will most benefit students according to the program’s stated goals and chosen evaluation criteria. A proposal-based model allows interested instructors to maintain control over how they approach their affordability project, while ensuring they receive adequate university support to complete their project.

Faculty grant programs are a common method of incentivizing affordability projects (McGowan, 2020) and similar programs already exist at institutions within Idaho, such as the University of Idaho’s Think Open Fellowship, Boise State’s OER Support Grants program, and the Idaho State Board of Education’s OPAL grant program. Numerous resources exist within the OER community to provide guidelines for the development and management of proposal-based affordability grant programs.

ISU Academic Affairs has provided funding for 10 affordability stipend awards for the completion of affordability projects for the 2022-2023 academic year. The proposal process takes advantage of existing proposal and monetary award processes already in place at ISU’s Instructional Technology Resource Center (ITRC). According to results of a survey conducted at Idaho State University in Fall 2021, ITRC assistance with course
redesign is one of the most highly requested professional development opportunities related to OER, which made the ITRC a natural choice to administer this program.

To raise the profile of affordability work at ISU, successful applicants are expected to give a brief presentation at the ISU Open Education Week events to be held annually in the first week of March. Further details about this program, including applicant requirements and project evaluation criteria, can be found in appendix A of this report.

Timeline:

Ten affordability grants were allotted to ISU faculty in Spring 2022 for an affordability project to be implemented in a course taught Fall 2022 and/or Spring 2023. Successful applicants will give a presentation at ISU Open Education Week in March 2023.

Outcomes:

• The ISU Affordability Grant Program intends to continue to award a minimum of 10 grants on an annual basis.

• Metrics will be collected to measure the success of the program, which may include data on total student cost savings, increased awareness among faculty, improved course material accessibility, and other pedagogical benefits related to OER adoption.

8. Expand Regular Professional Development Related Course Material Affordability

Increased awareness of OER initiatives has been shown to increase OER adoption rates among faculty (Seaman & Seaman, 2020). One way ISU can raise the awareness level of OER on campus is to provide regular professional development opportunities and proactively market them at the university, college, and department level.

In Fall 2021, ISU’s OER Committee surveyed faculty members about their biggest professional development needs related to OER. Based on these survey results, the top professional development opportunity of interest was assistance with OER discovery (searching for OER relevant to their courses and disciplines).

Within Idaho State University Libraries, the Open and Affordable Educational Resources (OAER) Committee has established the annual ISU Open Education Week. This provides an opportunity for University Libraries, the Instructional Technology Resources Center (ITRC), and the Program for Instructional Effectiveness (PIE) to offer professional development opportunities in conjunction with this event, as well as regularly throughout the year.

Timeline and Outcomes:

• Professional development opportunities will be held annually at ISU and will be widely promoted.
• At least one professional development opportunity related specifically to OER discovery will be offered annually through the Program for Instructional Effectiveness (PIE) at ISU.

• The ISU Open Education Week event will be held annually to promote OER awareness and may be held in conjunction with professional development opportunities related to OER. The event will continue to be held the first week in March to coincide with global Open Education Week.
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