



Textbook Affordability Strategic Plan

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Executive Summary

At [the University of Oregon \(UO\)](#), we value “diversity and seek to foster **equity and inclusion** in a welcoming, safe, and respectful community,” while “[enhancing] the...**economic wellbeing** of our students.” Since we know that [59% of our students can't meet the required expenses at UO](#), it's important to recognize that textbook affordability presents an equity issue that we must address and remedy; we might be inadvertently disadvantaging our learners or impacting their success if they are forced to choose between paying for textbooks and other basic needs, such as rent and food.

There is also urgency to this issue; we know that according to the [2020 US PIRG report, *Fixing the Broken Textbook Market*](#), 63% of students skipped buying or renting their textbook, and locally at the UO, 54% of students reported that they skipped buying or renting at least one book. It's imperative that both as an institution and individually as faculty, administrators, and librarians, we commit to finding ways to offset the increasing cost of earning a degree where we can have a direct impact: on textbooks and course materials selection.

This document serves as an institutional response to the growing issue of student textbook affordability and a commitment to actionable steps to support students and faculty in lowering course materials costs. Each of the outlined action items will require more in-depth exploration and implementation by a future work group, as addressed in both *Governance* and *Building on Strengths* sections of this report.

Background & Planning Approach

In 2020, the Office of the Provost and University Senate convened the Textbook Affordability Task Force in response to [Oregon HB 2213](#), which requires each community college and university in Oregon to create a textbook affordability strategic plan. This task force met bi-weekly over the 2020-2021 academic year to formulate an institutional response to reducing textbook costs for UO students.

Oregon HB 2213 specifically calls for UO to establish a textbook affordability plan that:

- Contains measurable goals for increasing textbook affordability
- Addresses how to best mitigate the economic impact of decreased academic bookstore revenue as a result of increased adoption of low-cost or no-cost course materials
- Sets forth steps to advertise courses designated as low or no-cost to students
- Contains a statement of support for academic freedom of faculty to select high-quality course materials
- Establishes a process for faculty to be informed about available low-cost and no-cost course materials

In addition to HB 2213, pending legislation in Oregon will require universities and community colleges to report 75% of course materials costs by the time of course registration to increase course materials cost transparency, as outlined in [HB 2919](#). The task force is using the timing of this strategic plan to look ahead and also incorporate the requirements of this legislation.

In 2015, Oregon [HB 2871](#) was passed, which in part required Oregon colleges and universities to prominently mark low and no cost courses on the Class Schedule. The University of Oregon

implemented this designation in Fall of 2018 and has continued to mark low and no-cost courses using a footnote on the Class Schedule. The task force has identified some opportunities to improve our response to this previous legislation by improving the searchability of marked courses. The report, [*Evaluating Oregon's Open Educational Resource Designation Requirement*](#) by University of Oregon PPPM students was especially helpful in evaluating ways we may be able to improve to better support students.

To accomplish this work, the Office of the Provost convened a team with representation across the university, including OtP, faculty, ASUO, University Senate, UO Libraries, Student Advising, the Registrar's Office, and the Duck Store. This team met with various stakeholders on campus to gather information and feedback on the plan during Winter and Spring 2021 quarters.

Textbook Affordability Task Force Membership

- **Ron Bramhall**, Associate Vice Provost, Academic Excellence (Sponsor)
- **Robin Clement**, Director, Master of Accounting Program, Senior Lecturer II (Co-Chair)
- **Rayne Vieger**, ProTem eLearning & OER Librarian (Co-Chair)
- **Nick Keough**, ASUO Senate
- **Maya Ward**, ASUO Executive
- **Alex Lyons**, Chief Information Officer, The Duck Store
- **Mike Urbancic**, Senior Instructor I
- **Sarah Strickler**, Assistant Registrar for Operations
- **Tara Parillo**, Director, TRIO-SSS

One of the initial actions this task force took was to develop a faculty survey to gather information about how UO faculty find and select course materials, as well as identify the support they need to consider lower-cost solutions, such as Open Educational Resources (OER). The task force launched the survey during Winter 2021 quarter and received 190 faculty responses. These responses, as outlined in *Appendix I: Faculty Course Materials Selection Survey Results*, informed the creation of this plan, in particular around identifying incentives and support faculty need in *Action item 5*.

Strategic Plan

Timeline

This strategic plan is intended to be completed over a three year period beginning with Fall 2021 and ending with Fall 2024. The expectation is that the plan will be continually evaluated and adjusted over this three year period as needed, and that a new strategic plan can be created following the completion of this initial plan. Recommendations for that plan are included in the *Building on Strengths* section of this report.

The task force expects that the item that will take the greatest amount of time initially is implementing the requirements of HB 2919 regarding the requirement for faculty to report course materials prior to course registration. If the house bill passes, we expect an initial investment of time and resources to operationalize the requirements of the house bill. Even if the house bill doesn't pass, the task force believes this level of transparency benefits students and supports their success, so we would instead focus on creating a policy that mirrors the legislation. Creating this policy will require stakeholder input and approval from the Office of the Provost, University Senate, United Academics, and potentially other key groups, so we anticipate this taking a full academic year to approve. If needed, our goal is to have this policy approved and in place by Spring 2022. This first step is critical given that subsequent

action items are dependent on increased course materials reporting and identifying the costs associated with these materials.

Another major action item in the first year focuses on modifying systems to facilitate the transfer of information between the Duck Store and Banner systems, which will ultimately provide timely transparent information for students as they make course materials decisions. In particular, the task force hopes to connect the Duck Store Book List and the Class Schedule, which we anticipate will require developer support from Information Services and a data sharing agreement from UO General Counsel. Additionally, we hope to improve the current searchability of the Class Schedule and Schedule Builder to enable students to search for and filter low and no cost courses. The task force is using the planned overhaul of the course registration process in Banner and DuckWeb to make these improvements.

Frontloading these initial steps in the first year will help provide necessary infrastructure and give us better data about where it might be most beneficial to focus textbook affordability outreach efforts, such as on the highest cost courses or programs at the UO. The task force anticipates that the period of Fall 2022 to Fall 2024 will be focused on outreach to individual faculty and departments to identify options to lower costs, as well as supporting students lowering their course materials costs.

Plan Governance Structure

The task force recommends forming an implementation work group to carry out this plan over the next three years, which should include representation from the following stakeholder units on campus, with suggested team members included:

Name	Title	Unit
Ron Bramhall	Associate Vice Provost, Academic Excellence	Office of the Provost
Rayne Vieger	Coordinator, eLearning & OER	UO Libraries
Sarah Strickler	Assistant Registrar for Operations	Office of the Registrar
Alex Lyons	Chief Information Officer	The Duck Store

The task force also recommends that this work group continue to consult with student and faculty stakeholders for input, in particular from University Senate and ASUO.

Statement of Support for Academic Freedom

As part of this strategic plan, the Textbook Affordability Task Force reaffirms the [University of Oregon's policy statement on Academic Freedom](#). We interpret this policy to also mean that faculty have the freedom to choose which high-quality course materials they wish to use to support their teaching.

The University of Oregon encourages and supports open, vigorous, and challenging debate across the full spectrum of human issues as they present themselves to the university community. The University of Oregon protects free speech through [Policy No. 01.00.16](#). This policy on Academic Freedom builds on these existing commitments by recognizing the special contexts of scholarship, teaching, governance, and public service.

SECTION 1

- a. *SCHOLARSHIP. The University's research mission requires that members of the UO community have autonomous freedom to conduct research and produce creative work, and to publish and disseminate that work, limited only by the standards and methods of accountability established by their profession and their individual disciplines.*
- b. *TEACHING. The University's responsibility to help students to think critically and independently requires that members of the university community have the right to investigate and discuss matters, including those that are controversial, inside and outside of class, without fear of institutional restraint. Matters brought up in class should be related to the subject of courses or otherwise be educationally relevant, as determined primarily by the faculty member in charge of the class.*
- c. *POLICY AND SHARED GOVERNANCE. Members of the university community have freedom to address, question, or criticize any matter of institutional policy or practice, whether acting as individuals or as members of an agency of institutional governance.*
- d. *PUBLIC SERVICE. Public service requires that members of the university community have freedom to participate in public debate, both within and beyond their areas of expertise, and to address both the university community and the larger society with regard to any matter of social, political, economic, cultural, or other interest. In their exercise of this freedom, university community members have the right to identify their association or title, but should not claim to be acting or speaking on behalf of the University unless authorized to do so.*

SECTION 2

These freedoms derive immediately from the university's basic commitment to advancing knowledge and understanding. The academic freedoms enumerated in this policy shall be exercised without fear of institutional reprisal. Only serious abuses of this policy – ones that rise to the level of professional misbehavior or professional incompetence – should lead to adverse consequences. Any such determinations shall be made in accordance with established, formal procedures involving judgment by relevant peers.

Major Phases of the Strategic Plan

The task force has adopted the following two-phase framework for strategic success:

Phase 1: Improving course materials information collection & reporting

Right now, we estimate that we only know costs for around 40% of course materials. While some departments may collect course materials internally within their academic unit, the Duck Store VerbaCollect system is the only central effort to collect required course material information used in UO courses, and the process is currently optional for instructional faculty. Because of this, we cannot accurately calculate the current cost of course materials across the university or calculate progress made on textbook affordability efforts, such as student savings or cost avoidance.

Before we increase textbook affordability, it's important to understand the landscape at the UO, which includes what fees and course materials students are currently responsible for beyond their tuition costs. The initial phase of this plan is focused on putting infrastructure and policy in place that will facilitate the collection and sharing of this data.

This phase will lead to:

- Increased transparency of course materials costs at the time of student course registration, which will allow students more time to source low-cost options, budget for course materials, and/or seek out financial support for course materials.

- Improved searchability for low and no cost courses on the Class Schedule.
- Better reporting of course materials costs and course materials cost avoidance over time.

Phase 2: Increasing textbook affordability

After this initial infrastructure is in place, the second phase of this plan is focused on faculty outreach and support, increased faculty adoption of low/no-cost course materials, reducing student costs, and offsetting impacts to the Duck Store that may occur over time as more faculty reduce their course materials costs.

This phase will lead to:

- Increased low and no cost course offerings at UO.
- Increased awareness of textbook affordability and the variety of ways to offset student costs.
- Increased student savings or cost avoidance when registering for low/no cost designated courses.

Phase 1 Action Items

Action Item 1: Operationalize state legislation requiring publication of course materials and costs or adopt institution-wide policy to require faculty to report course materials and costs prior to course registration.

- 1.1 At time of this report, state legislation is pending that, if it passes, will require the institution to publish course materials and their costs along at the same time as the course schedule is published. If the legislation passes, the task force recognizes that the university will need to build processes and tools to comply with that legislation. There are strong indications that the legislation will pass; it has broad support among legislators and key constituents such as students.
- 1.2 Should the legislation not pass, the task force still believes it is worthwhile to be more transparent about the costs of course materials in time for students to make informed choices about their courses. This will require the passing of a policy along the lines of what the state legislation would have required.

Performance measures:

- By Spring 2022, UO will adopt an institution-wide approach to publish course materials information and costs at the time that course registration opens for each term.

Action item 2: Improve course materials data collection and sharing processes to increase transparency of course materials cost for students.

- 2.1 Develop a process and support resources for faculty to report materials through the Duck Store by the time of registration, including no-cost course materials (such as OER and library resources).
 - 2.1.1 Develop faculty communication and outreach plan.
 - 2.1.2 Develop documentation and guides to support faculty in reporting course materials.
- 2.2 Develop methods to optimize data sharing between the Duck Store book list and the UO Class Schedule to improve the visibility of required course materials and their associated costs.

- 2.2.1 Negotiate a data sharing agreement for the Duck Store in consultation with UO General Counsel.
- 2.2.2 Work with Information Services to connect the Duck Store Book List to the UO Class Schedule.
- 2.2.3 Collect faculty course materials adoptions prior to the start of course registration and display these course materials costs on the Duck Store book list and the UO Class Schedule.

Performance measures:

- Beginning with the 2022-2023 academic year, UO will begin to collect reported course materials by the time of registration to get to the goal of 75% of course materials adoptions.

Action item 3: *Improve visibility and searchability of low and no cost courses.*

- 3.1 Modify the current course schedule designation to make the low and no-cost designation more prominent and intuitive.
- 3.2 Add functionality to schedule that allows students to search by or filter courses labeled with the low and no-cost designation.
- 3.3 Provide resources for student support teams on campus, such as student advising, to better understand the low and no-cost class schedule designation and how to support students in using it in Schedule Builder.
- 3.4 Provide resources for students to help them understand how to locate low and no cost course offerings, as well as resources to assist with course materials costs.

Performance measures:

- Completed added schedule functionality and navigation ability to course schedule for low cost/OER options
- Completed added schedule functionality to provide course material costs information at the time of registration
- Provide workshops and other materials to student support teams to aid in informing and advising students regarding low-cost/OER courses.

Action item 4: *Provide information and resources to students, faculty and leadership teams on campus to help raise awareness about OER and textbook affordability.*

- 4.1 Identify existing financial aid and support programs on campus that students may be able to leverage to offset course materials costs, such as textbook lending libraries and textbook scholarships.
- 4.2 Develop central textbook affordability resource website, which contains information and support for students, faculty, and leadership teams on campus to learn about available resources to lower course materials costs.

Performance measures:

- By Winter 2022, develop and launch a textbook affordability website.
- Compile student financial support programs on central textbook affordability website.
- Compile available faculty support resources for textbook affordability on central textbook affordability website.

Phase 2 Action Items

Action item 5: Provide incentives and support for faculty to reduce course materials cost in UO classes.

- 5.1 Offer ongoing faculty professional development opportunities to promote adopting, adapting, and authoring OER and low-cost alternatives. Integrate this professional development where possible with existing course development opportunities on campus such as UO Online and TEP offerings.
- 5.2 Based on increased course materials reporting, provide transparent data back to faculty and departmental decision-makers about course materials costs.
- 5.3 Recommend ways to align and incorporate textbook affordability efforts in faculty teaching evaluations, such as the Instructor Self-Reflection.
- 5.4 Propose pilot funding for a textbook affordability initiative, which would include a position focused on affordability, as well as faculty funding to support adopting, adapting and authoring open and affordable resources.

Performance measures:

- Number of low cost/OER courses developed by funding
- Payback period for investment in support—number of terms of cost savings to offset the investment in developing the low cost/OER courses.
- Develop and offer faculty textbook affordability workshop once per term.
- Offer individual department or college specific workshops and presentations on textbook affordability.

Action item 6: Increase the number of faculty using OER or low-cost alternatives, while also maintaining the quality of educational materials and respecting academic freedom.

- 6.1 Based on increased reporting of course materials, compile list of high cost and high impact courses, such as Core Education, high-enrollment, and high drop, fail, withdrawal (DFW) rates, to target faculty outreach.
- 6.2 Identify courses where high-quality, low-cost or OER options exist and provide information to faculty and departmental decision-makers about these available options to lower course materials costs.
- 6.3 Work with college leadership teams to identify resources to support implementation of low-cost solutions.

Performance measures:

- Develop database with courses identified according to high cost, high impact (# of students per academic year), high DFW rates
- Improved DFW rates for courses w/OER, low-cost options
- List of high-quality low cost or OER options provide to faculty
- Meet with college leadership teams to raise awareness about textbook affordability and identify individual resources needed.
 - Pilot a targeted approach to reducing textbook costs with an academic college or department.

- Work with Core Education Council to identify high impact courses that might be good candidates for OER/low-cost materials.

Action item 7: *Consider the potential revenue loss from increased OER adoptions and offset the financial impacts to the Duck Store.*

- 7.1 Work with Duck Store, Registrar's Office and other UO groups to identify incremental costs borne by Duck Store to collect adoption data and price adoptions on books and other course materials.
- 7.2 Propose university compensation for use of Duck Store resources, such as technology and personnel, to meet the requirements of this strategic plan and Oregon textbook affordability legislation.
- 7.3 Where no OER or low-cost resources exist for high-impact classes as defined above, work with the Duck Store to negotiate lower commercial options with publishers, such as Direct Digital Access.

Performance measures:

- Completed costing analysis
- Completed negotiated agreement with Duck Store to compensate them for providing data needed by UO to provide information regarding textbook costs and adoption of OER/low-cost course materials

Building on Strengths

As stated in *Background & Planning Approach*, part of the specific requirements of HB 2213 include measurable goals for increasing textbook affordability, such as target student savings or a certain number of courses designated as low or no-cost. These two specific metrics are difficult for us to include at this time without a good understanding of our baseline as a university. After consultation with our Open Oregon statewide OER coordinator, Amy Hofer, the task force recommends including such goals and metrics in the subsequent Textbook Affordability Strategic Plan, beginning with Fall 2024. That said, this plan still includes goals and action items that will impact affordability, mainly by raising awareness and providing support to both students and faculty on campus.

While this report represents the completion of the formal charge of the textbook affordability task force, the team agrees that it would be helpful to oversee the implementation of the plan and provide consultation as needed. With that in mind, we will postpone sunsetting this team and will continue meeting through AY 2021-2022.

Appendix

Appendix A: Faculty Course Materials Selection Survey

In order to inform the creation of this plan, the textbook affordability task force surveyed faculty to gain a better understanding about how UO faculty find and select course materials. Specifically, the task forces wanted to learn more about:

- What factors influence faculty selection of course materials and who is in charge of selection
- Awareness and perception of OER
- Awareness of textbook affordability support resources through UO and Open Oregon
- Barriers to adopting Open Educational Resources
- Needs relating to textbook affordability and course materials selection

To do this, the task force adapted the openly licensed [Selection of required course materials: A faculty survey](#), which was originally developed by Rajiv Jhangiani for post-secondary institutions in British Columbia. The task force consulted with UO Research Compliance to assess whether or not the scope of work met the federal definition of "research" that would require oversight by UO Research Compliance or the IRB, and obtained an exemption. Specifically, because the results of this survey are being used for institutional evaluation and planning purposes, we determined that they are not intended for contribution to generalizable knowledge.

To help protect participants' confidentiality, the survey did not collect personally identifiable information, such as name, email address or IP address. Faculty could optionally provide their email contact information upon completion of the survey if they were willing and interested to be contacted further about their responses and the work of the task force.

All teaching faculty at the University of Oregon were eligible to participate, and the task force solicited participation by sending the survey to both University Senate and to all Academic Unit Heads. Participation was completely voluntary, and faculty could withdraw from participating at any time without penalty. The survey ran for a period of three weeks during Winter 2021 term, and 190 faculty participants responded.

Survey Response Summary

N=190

How many years have you been teaching? (Enter value in years)

Years teaching range: 1-50

M= 15.82

SD=11.06

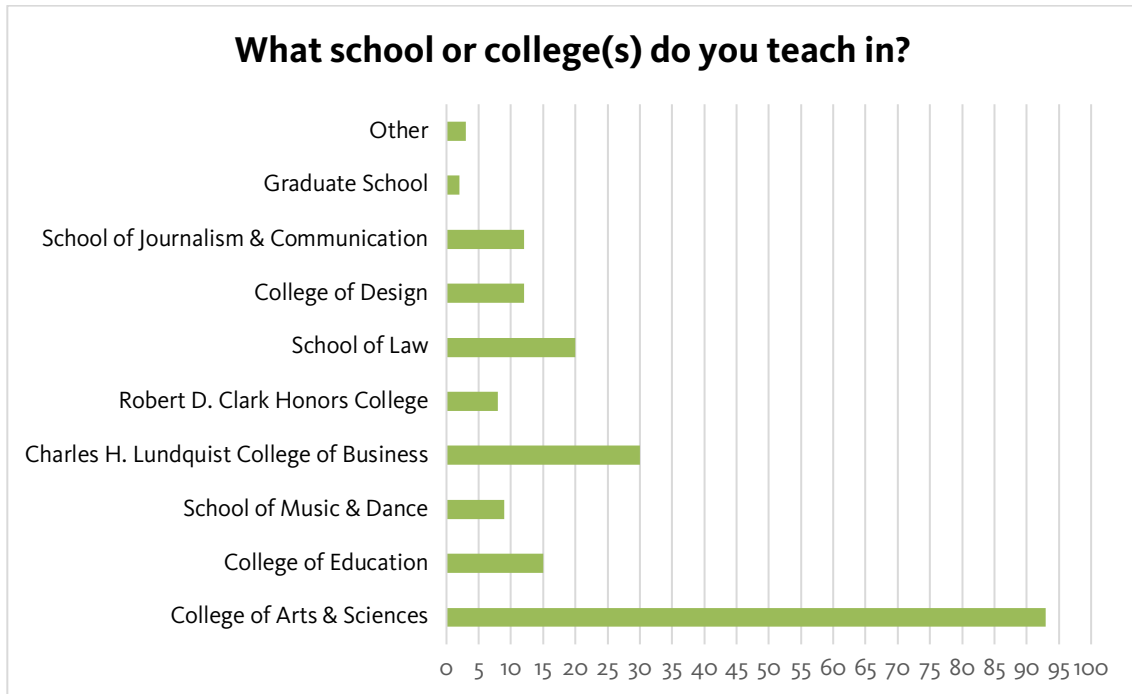
How many courses do you typically teach each academic year? (Enter total number of courses taught in one year, including if a course is taught multiple times in the academic year)

Number of courses taught range: 1-15

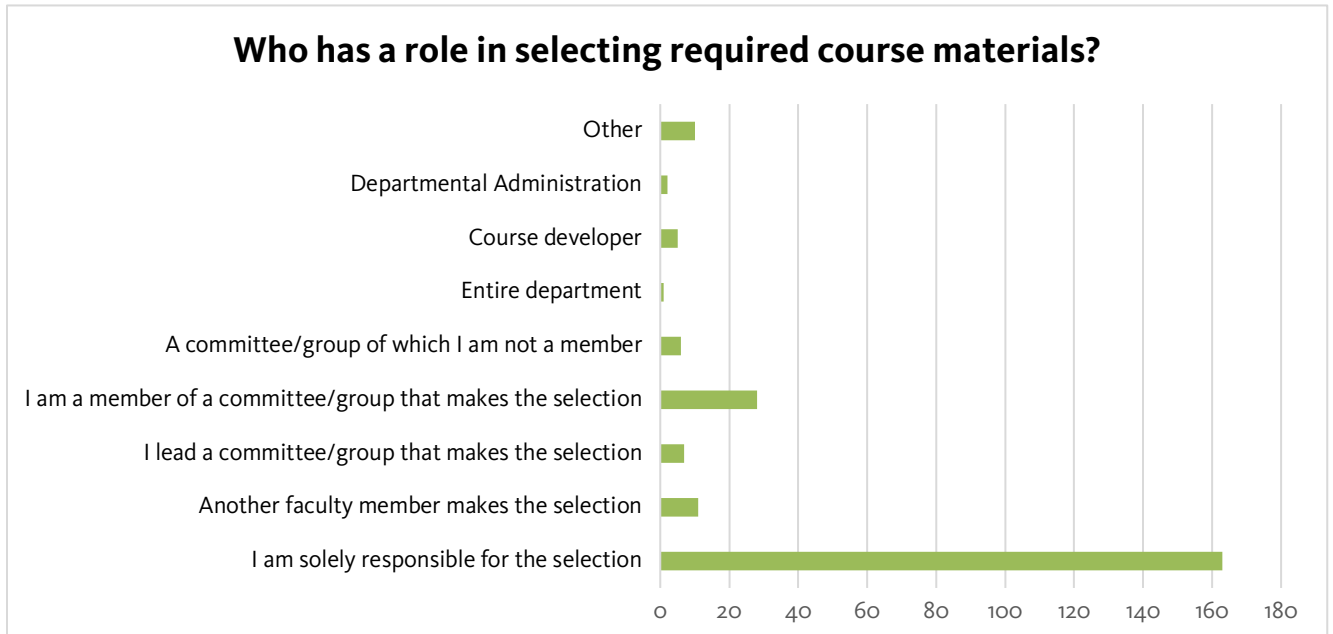
M= 4.09

SD=2.08

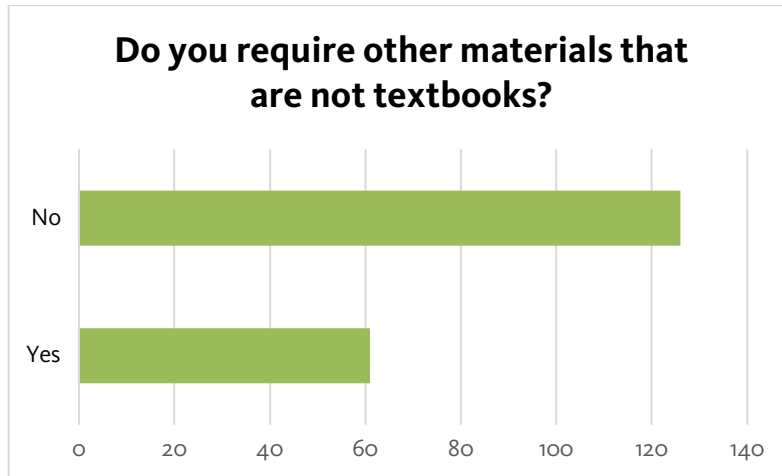
What school or college(s) do you teach in? (Select all that apply)



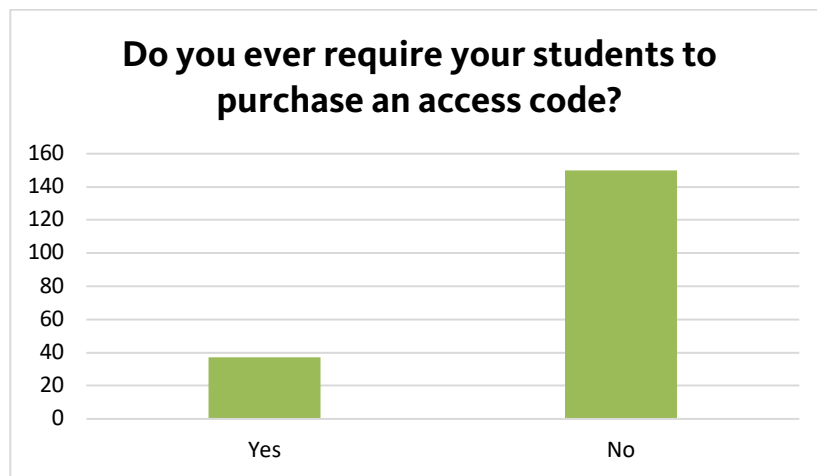
Who has a role in selecting required course materials (including textbooks) for use in the courses you teach? (Select all that apply)



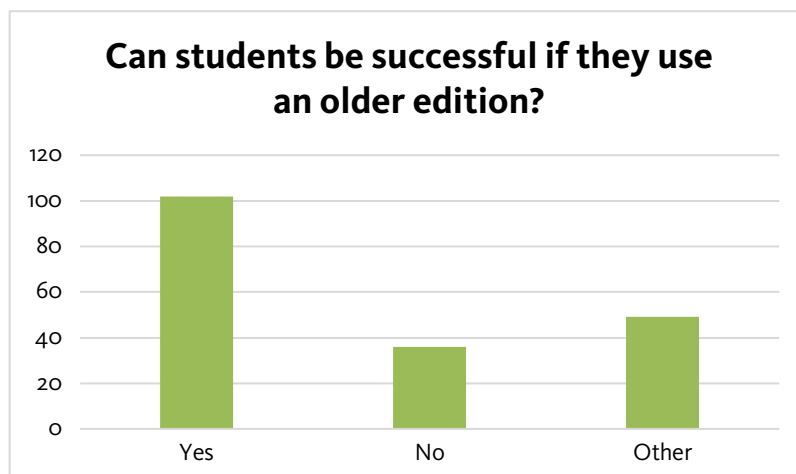
Do you require other materials that have a cost, but are not textbooks, such as clickers, calculators, or subscription services?



Do you ever require your students to purchase an access code for an online resource that comes bundled with a required textbook?



Can students be successful in your course if they use an older edition of your required textbook(s)?



What percentage of required textbook(s) do you typically assign in your course(s)?

Percentage assigned range: 0-100

M=65.78

SD=27.88

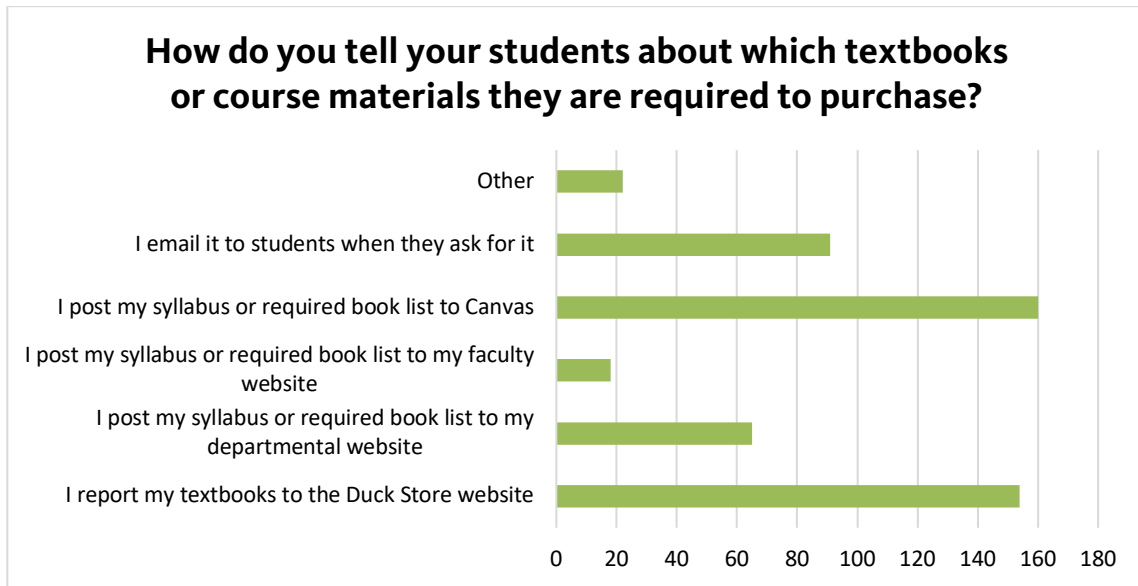
In your experience, what percentage of content is noticeably revised when a new edition of a typical textbook in your discipline is published?

Percentage revised range: 0-100

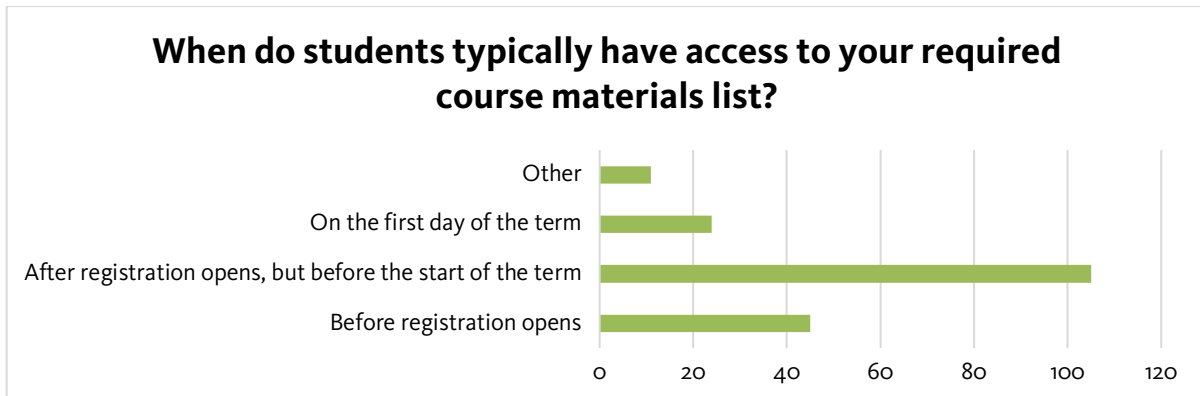
M=20.70

SD=15.87

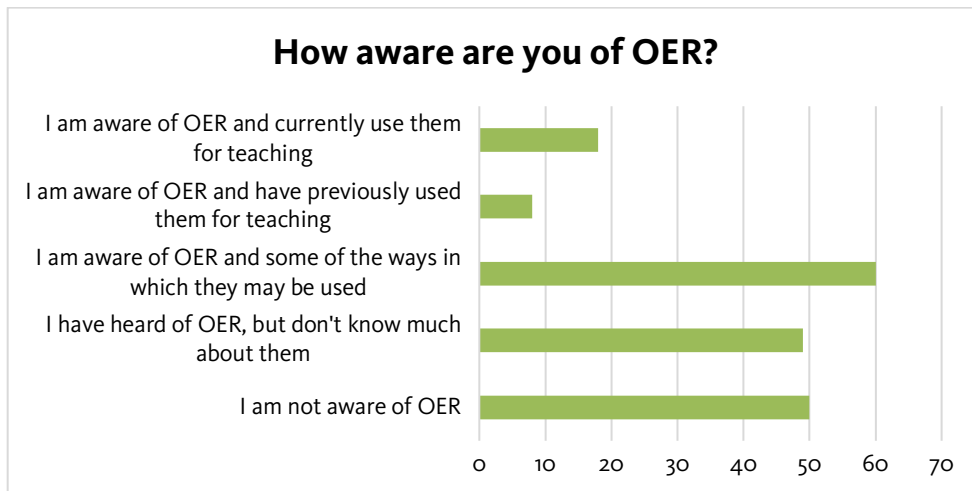
How do you tell your students about which textbooks or course materials they are required to purchase for your course? (Select all that apply)



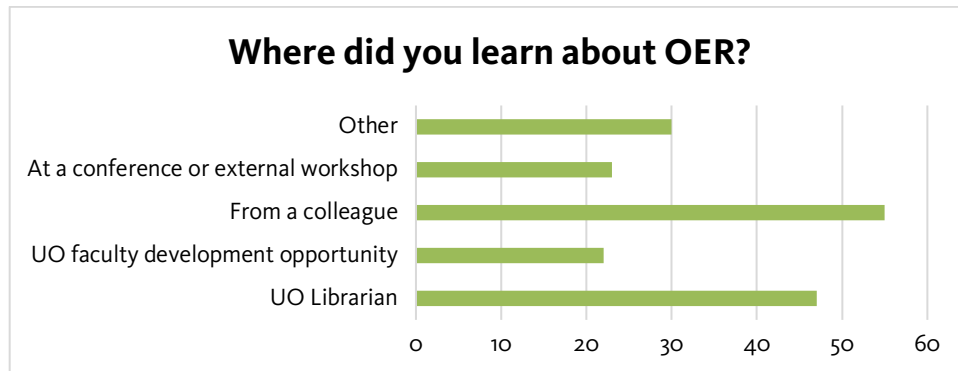
When do students typically have access to your required textbook or course materials list?



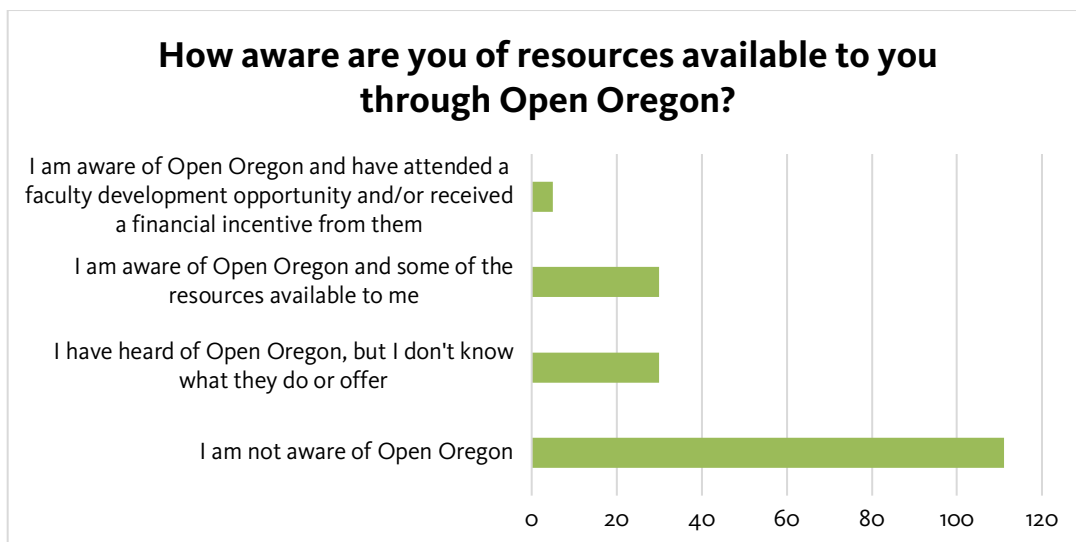
How aware are you of Open Educational Resources (OER)?



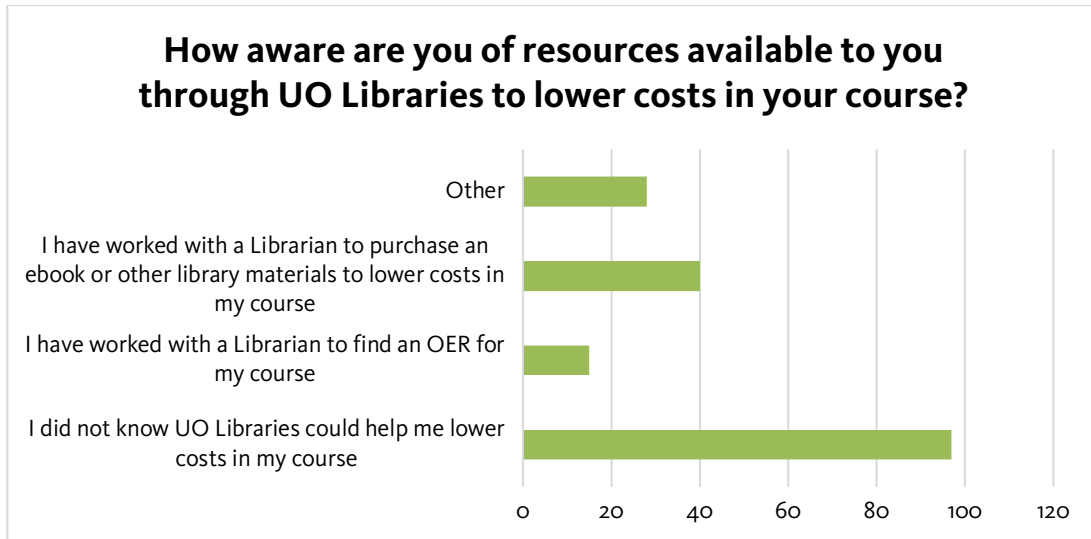
Where did you learn about OER? (Select all that apply)



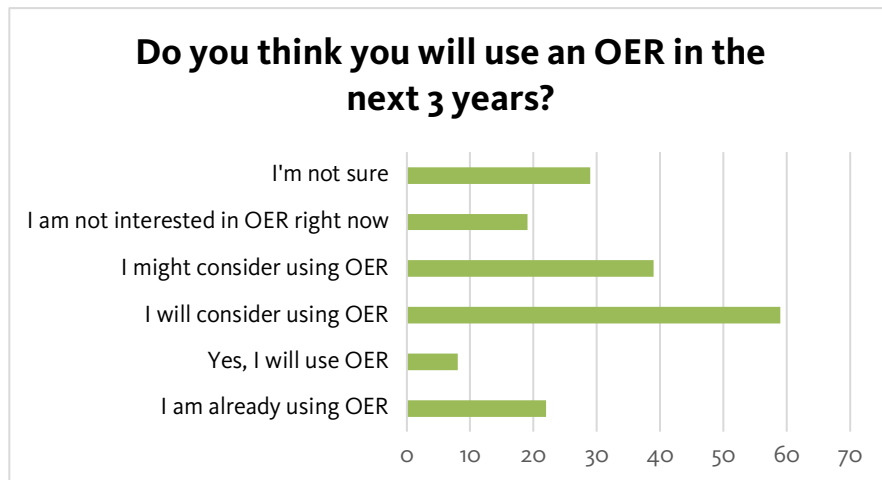
How aware are you of resources available to you through Open Oregon?



How aware are you of resources available to you through UO Libraries to lower costs in your course? (Select all that apply)



Do you think you will use an Open Educational Resource in the next three years?



What resources and support do you need to consider using Open Educational Resources? (Select all that apply)

