SUBJECT
Board Policy III.N., Statewide General Education – First Reading

REFERENCE

December 2016	The Board approved the first reading of Board Policy III.N. clarifying oral communication competencies.
February 2017	The Board approved the second reading of Board Policy III.N.
August 2017	The Board approved the first reading of Board Policy III.N. amending the makeup of the committee and setting a timeline for competency review.
October 2017	The Board approved the second reading of Board Policy III.N.
August 2018	The Board approved the first reading of proposed amendments to Board Policy III.N. establishing a common course indexing system within the General Education Matriculation (GEM) framework to assist with transfer.
October 2018	The Board approved the second reading of proposed amendments to Board Policy III.N.
August 2019	The Board approved the first reading of proposed amendments to Board Policy III.N. clarifying process for changes to common course index.
October 2019	The Board approved the second reading of proposed amendments to Board Policy III.N.
October 2020	The Board approved the first reading of proposed amendments to Board Policy III.N. designating the Executive Director or designee as chair of the GEM Committee.
December 2020	The Board approved the second reading of proposed amendments to Board Policy III.N.
August 2021	The Board approved the first reading of proposed amendments to Board Policy III.N. expanding membership of the GEM Committee to representatives from digital learning, dual credit, and open education. This included amendments to GEM competency areas.
October 2021	The Board approved the second reading of proposed amendments to Board Policy III.N.

APPLICABLE STATUTE, RULE OR POLICY
Idaho State Board of Education Governing Policies & Procedures, Section III.N. and III.V.
Section 33-3729, Idaho Code

BACKGROUND/DISCUSSION

Board Policy III.N., General Education, outlines the statewide General Education Framework, which provides guidance to Idaho's public institutions in identifying courses that meet the General Education Matriculation (GEM) competencies for the facilitation of seamless credit transfer for students. Board Policy III.V. Articulation and Transfer, governs the articulation of students and transfer of credits between Idaho's public postsecondary institutions. In addition, Section 33-3729, Idaho Code, states that a student who "completed the general education framework as defined by the state board of education, without an associate of arts or associate of science degree, and transfers from a postsecondary institution in Idaho accredited by a regional accrediting body recognized by the state board of education will not be required to complete additional general education requirements at the receiving Idaho public postsecondary institution." In the event of a conflict between board policy and state statute, the statute would govern. This would be inclusive of any institutionally designated general education courses. Board policy III.N. defines that general education framework.

Consistent with Board Policy III.N.6, faculty discipline groups representing all institutions meet at least annually to ensure consistency and relevance of general education competencies and courses approved for their respective GEM competency areas. At this year's General Education Summit, the Oral Communication discipline group recommended amendments to the Oral Communication requirement of the general education framework that will increase the minimum number of credits required from two (2) to three (3). The two-credit minimum for Oral Communication was originally established because, initially one institution was not able to offer a 3-credit class in this area. However, in practice, only 3-credit options existed at most institutions and all institutions now offer a 3-credit option. However, this lower threshold has the potential to create challenges for transfer students in particular. The GEM Committee met on October 7, 2022 to review and discuss the proposed amendment. In order to facilitate the proposed change to Oral Communication, credits will need to decrease in another area. After much discussion, the committee determined to amend the minimum number of credits required for institutionally-designated from six (6) to five (5).

Other amendments include removing the diagram from policy as it is no longer necessary and does not provide any explanatory value.

IMPACT

Approval of the proposed amendments will increase transparency and ease transfer among institutions in the area of Oral Communication.

ATTACHMENTS

Attachment 1 - Board Policy III.N., Statewide General Education – First Reading

BOARD STAFF COMMENTS AND RECOMMENDATIONS

Board staff supports this proposal. Increasing the category of Oral Communication to three credits more fairly represents the experience of most students, and it

reduces a barrier for some transfer students.

Proposed amendments were shared with the Council on Academic Affairs and Programs on December 1, 2022, and shared with the Instruction, Research and Student Affairs committee on December 8, 2022.

BOARD ACTION

I move to approve the first reading of proposed amendments to Board Policy III.N., Statewide General Education, as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

ATTACHMENT 1

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: III. POSTSECONDARY AFFAIRS
**SUBSECTION: N. Statewide General Education**   **October 2021**

In our rapidly-changing world, students need to understand how knowledge is generated and created. They need to adapt to new opportunities as they arise as well as effectively communicate and collaborate with increasingly diverse communities and ways of knowing. In combination with major coursework, general education curriculum prepares students to use multiple strategies in an integrative manner to explore, critically analyze, and creatively address real-world issues and challenges. General education coursework provides students with an understanding of self, the physical world, and human society—its cultural and artistic endeavors as well as an understanding of the methodologies, value systems, and thought processes employed in human inquiries. General education helps instill students with the personal and civic responsibilities of good citizenship, and prepares them to be adaptive, life-long learners.

This policy shall apply to the University of Idaho, Boise State University, Idaho State University, Lewis-Clark State College, College of Eastern Idaho, College of Southern Idaho, College of Western Idaho, and North Idaho College (hereinafter "institutions").

1. The state of Idaho's general education framework for Associate of Arts, Associate of Science, and Baccalaureate degrees, outlined below in Figure 1, shall be:

    a. Thirty-one (310) credits or more of the general education curricula must fit within the general education Matriculation (GEM) competency areas defined in subsection 4 of this policy, and

    b. Six Five (56) or more credits of the general education curricula, which are reserved for institutions to address the specific mission and goals of the institution. For this purpose, institutions may create new competency areas or they may choose to count additional credits from GEM competencies. Regardless, these institutionally designated credits must have learning outcomes linked to Association of American Colleges and Universities (AAC&U) Essential Learning Outcomes.

Fig. 1: General education framework reflecting AAC&U Essential Learning Outcomes

GEM (310 cr. or more)   Institutional (56 cr. or more)

Integrative Skills   Ways of Knowing
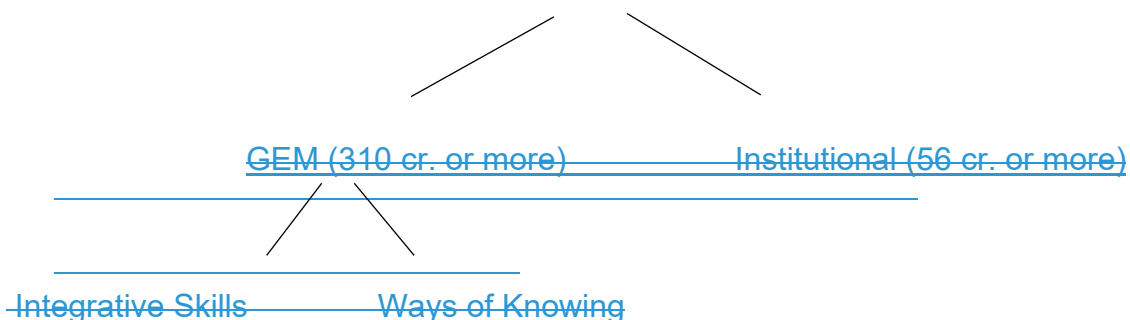
2. The intent of the general education framework is to:

    a. Establish statewide competencies that guide institutions' determination of courses that will be designated as GEM courses
    b. Establish shared rubrics that guide course/general education program assessment; and
    c. Create a transparent and seamless transfer experience for undergraduate students.

3. There are six (6) GEM competency areas. The first two (2) emphasize integrative skills intended to inform the learning process throughout general education and major. The final four (4) represent ways of knowing and are intended to expose students to ideas and engage them in a broad range of active learning experiences. The GEM competency areas are as listed:

    a. Written Communication
    b. Oral Communication
    c. Mathematical Ways of Knowing
    d. Scientific Ways of Knowing
    e. Humanistic and Artistic Ways of Knowing
    f. Social and Behavioral Ways of Knowing

4. GEM courses in each area shall include the following competencies:

    a. Written Communication
        Upon completion of a course in this category, students are able to demonstrate the following competencies:

        i.   Use flexible writing process strategies to generate, develop, revise, proofread, and edit texts.
        ii. Adopt strategies and genre appropriate to the rhetorical situation.
        iii. Use inquiry-based strategies to conduct research that explores multiple and diverse ideas and perspectives, appropriate to the rhetorical context.
        iv. Use rhetorically appropriate strategies to evaluate, represent, and respond to the ideas and research of others.
        v.   Address readers' biases and assumptions with well-developed evidence-based reasoning.
        vi. Use appropriate conventions for integrating, citing, and documenting source material.
        vii. Read, interpret, and communicate key concepts in writing and rhetoric.

    b. Oral Communication
        Upon completion of a course in this category, students are able to demonstrate the following competencies:

   i. Research, discover, and develop information resources and structure spoken messages to increase knowledge and understanding.

   ii. Research, discover, and develop evidence-based reasoning and persuasive appeals for ethically influencing attitudes, values, beliefs, or behaviors.

  iii. Adapt spoken messages to the diverse personal, ideological, and emotional needs of individuals, groups, or contexts.

  iv. Employ effective spoken and nonverbal behaviors that support communication goals and illustrate self-efficacy.

   v. Listen in order to effectively and critically evaluate the reasoning, evidence, and communication strategies of self and others.

  vi. Demonstrate knowledge of key theories, perspectives, principles, and concepts in the Communication discipline, as applied to oral communication.

c. Mathematical Ways of Knowing
Upon completion of a course in this category, a student is able to demonstrate the following competencies:

   i. Interpret mathematical concepts.
   ii. Represent information/data.
  iii. Use appropriate strategies/procedures when solving mathematical problems.
  iv. Draw reasonable conclusions based on quantitative information.

d. Scientific Ways of Knowing
Upon completion of a non-lab course in this category, a student is able to demonstrate competencies i-iv. A student is able to demonstrate all five competencies, i-v, upon completion of a lab course.

   i. Apply foundational knowledge and models of a discipline in the physical or natural sciences to analyze and/or predict phenomena.

   ii. Apply scientific reasoning to critically evaluate assertions.

  iii. Interpret and communicate scientific information via written, spoken and/or visual representations.

  iv. Describe the relevance of specific scientific principles to the human experience.

   v. Test a hypothesis in the laboratory or field using discipline-specific tools and techniques for observation, data collection and analysis to form a defensible conclusion.

e. Humanistic and Artistic Ways of Knowing
Upon completion of a course in this category, students are able to demonstrate at least five (5) of the following competencies:

   i. Recognize and describe humanistic, historical, or artistic works within problems and patterns of the human experience.

   ii. Distinguish and apply methodologies, approaches, or traditions specific to the discipline.

iii. Differentiate formal, conceptual, and technical elements specific to the discipline.
iv. Analyze, evaluate, and interpret texts, objects, events, or ideas in their cultural, intellectual or historical contexts.
v. Interpret artistic or humanistic works through the creation of art, language, or performance.
vi. Develop critical perspectives or arguments about the subject matter, grounded in evidence-based analysis.
vii. Demonstrate self-reflection, widened perspective, and respect for diverse viewpoints.

f. Social and Behavioral Ways of Knowing
Upon completion of a course in this category, students are able to demonstrate all five (5) of the following competencies.

i. Demonstrate knowledge of the theoretical and conceptual frameworks of a particular Social Science discipline.
ii. Describe self and the world by examining the dynamic interaction of individuals, groups, and societies as they shape and are shaped by history, culture, institutions, and ideas.
iii. Utilize Social Science approaches, such as research methods, inquiry, or problem-solving, to examine the variety of perspectives about human experiences.
iv. Evaluate how reasoning, history, or culture informs and guides individual, civic, or global decisions.
v. Identify the impact of the similarities and differences among and between individuals, cultures, or societies across space and time.

5. General Education Requirements

a. This subsection applies to Associate of Arts, Associate of Science, and Baccalaureate degrees. For the purpose of this policy, disciplines are indicated by course prefixes.

General education curricula must reflect the following credit distribution:

Competency Area	Minimum Credits
Written Communication	6
Oral Communication	3~~2~~
Mathematical Ways of Knowing	3
Scientific Ways of Knowing	7 (from two different disciplines with at least one laboratory or field experience)
Humanistic and Artistic Ways of Knowing	6 (from two different disciplines)
Social and Behavioral Ways of Knowing	6 (from two different disciplines)
Institutionally-Designated Credits	5~~6~~

  i. GEM courses are designed to be broadly accessible to students regardless of major, thus college-level and non-GEM pre-requisites to GEM courses should be avoided unless deemed necessary by the institution.

  ii. Additional GEM courses, beyond the general education curricula, may be required within the major for degree completion.

b. This subsection pertains to Associate of Applied Science (AAS) degrees.

The general education curricula for the AAS degree must contain a minimum of fifteen (15) credits, so distributed in the following areas:

Competency Area	Minimum Credits
Written Communication	3
Oral Communication	3
Mathematical Ways of Knowing	3
Social and Behavioral Ways of Knowing	3
Any general education course including institutionally designated courses	3

c. GEM courses and institutionally designated courses shall transfer as meeting an associated general education competency requirement at any institution pursuant to Board policy Section III.V.

6. Governance of the General Education Program and Review of Courses

a. GEM courses are developed by faculty and approved via the curriculum approval process of the institution delivering the courses. Faculty discipline groups representing all institutions shall meet at least annually or as directed by the Board, to ensure consistency and relevance of general education competencies and courses approved for their respective GEM competency areas.

b. Common Course Indexing is developed for courses offered within the GEM framework to provide greater transparency and seamlessness within transfer processes at Idaho's postsecondary institutions. Common-indexed courses are accepted as direct equivalents across institutions for transfer purposes. Common course indexing shall include common course prefix, common course number, common course title, and common GEM discipline area designation. The common course number shall be three digits in sequence, but can be preceded by a single digit if four numbers are utilized by the institution (x###).

The common course list shall be approved by the Board on an annual basis and shall be maintained by the Board office. Changes to the list may be proposed by faculty discipline groups to the General Education Matriculation Committee. Proposed additions or removal of courses on the common course list must be reviewed by the General Education Matriculation Committee prior to Board

ATTACHMENT 1

approval. The request to remove a common-indexed course from an institution's academic catalog must be approved by the Board. The request to discontinue a course must be submitted in writing by the institution to the Board office. The request shall be submitted no less than a year in advance and provide rationale for the inability to offer the course.

c. The General Education Matriculation (GEM) Committee shall consist of a Board-appointed representative from each of the institutions, from the Division of Career Technical Education, from the Idaho Registrars Council, from the digital learning community, from the dual credit community, from the open education community; and the Executive Director of the Board, or designee, who shall serve as the chair of the committee. To ensure alignment with AAC&U Essential Learning Outcomes and subsection 1, the Committee shall meet at least annually to review the competencies and rubrics of the general education framework. The Committee shall make recommendations to the Board regarding the general education framework and the common course list. The Committee shall review and make recommendations on the general education competencies as necessary. GEM Committee duties are prescribed by the Board, including those that may involve addressing issues related to competency areas and course offerings. The GEM Committee reports to the Council on Academic Affairs and Programs.

d. The institutions shall identify all general education courses in their curricula and identify them in a manner that is easily accessible by the public via their respective websites, as well as relevant web resources maintained by the Board office.

SUBJECT
Board Policy III.E. Certificates and Degrees – Second Reading

REFERENCE

December 2013	Board approved first reading of amendments to Board Policy III.E that included updates to definitions for technical certificates and credit hour.
February 2014	Board approved the second reading of amendments to Board Policy III.E.
June 2018	Board approved the first reading of amendments to Board Policy III.E and asked staff to provide a definition of an applied baccalaureate degree, separate from the academic baccalaureate degree.
February 2019	Board approved another first reading of amendments to Board Policy III.E due to changes between readings. This included a definition of an applied baccalaureate degree and a definition of micro-certifications.
April 2019	Board approved second reading of amendments to Board Policy III.E.
June 2020	Board approved the first reading of amendments to Board Policy III.E that added a definition of a specialized certificate.
August 2020	Board approved the second reading of amendments to Board Policy III.E.
October 2022	Board approved the first reading of amendments to Board Policy III.E. that revised the definition of microcredentials, updated several other definitions, and removed the advanced associate of applied science (AAS) degree.

APPLICABLE STATUTES, RULE OR POLICY
Idaho State Board of Education Governing Policies & Procedures, Section III.E.

BACKGROUND/DISCUSSION
Board Policy III.E. provides definitions for approved certificates and degrees, including credit requirements for career technical education programs and academic programs. A brief summary of proposed amendments to this policy are included here:

- Change definition of micro-certification to microcredential and break down the definition to differentiate between a stacked microcredential and a digital badge.
- Provide that microcredentials will be tracked and maintained through a platform approved by the Division of Career Technical Education. Currently this is SkillStack.

- Update definitions of academic undergraduate and graduate certificates to clarify that these certificates can be stand-alone or attached to an undergraduate or graduate degree, respectively.
- Reorganize the definition of technical certificates with one main definition to differentiate between basic, intermediate, and advanced technical certificates by a range of credits required for each.
- Remove the advanced associate of applied science (AAS) degree.
- Clarify that institutions may not confer honorary degrees on staff of the Office of the State Board of Education (OSBE).

IMPACT

The proposed amendments will provide institutions with guidance for the development of microcredentials and specialized certificates and will assist with distinguishing the differences between the technical certificates. Proposed amendments will require institutions offering technical certificates to reevaluate existing offerings to ensure those align with the new definition. Finally, proposed amendments will allow institutions to confer honorary degrees on employees of the Board who are not OSBE staff.

ATTACHMENTS

Attachment 1 – Board Policy III.E. Certificates and Degrees – Second Reading

STAFF COMMENTS AND RECOMMENDATIONS

There were no amendments between the first and second readings. Board staff recommends approval.

BOARD ACTION

I move to approve the second reading of proposed amendments to Board Policy III.E. Certificates and Degrees as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

ATTACHMENT 1

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: III.   POSTSECONDARY AFFAIRS
SUBSECTION: E. Certificates and Degrees   ~~August 2020~~ December 2022

1.   Definitions

Programs of instruction require specified numbers of credits earned through educational work on the part of students. Completion of the program of instruction results in the awarding of a certificate to or conferring of a degree upon the student by the faculty and the Chief Executive Officer.   The following definitions have been approved by the Board:

a.   MICROCREDENTIALS
Credentials awarded for mastery of defined skills or concepts, including career technical and academic skills. Microcredentials reflect skills, knowledge, and abilities gained in increments and measured by identified outcomes that are equal to or less than a single course of study but may also build upon or complement each other, resulting in a stacked microcredential. Microcredentials are most often distributed as digital badges.

   i.   Stacked ~m~Microcredential
   A set of organized microcredentials that an individual can earn after meeting specific outcomes. Completion of stacked microcredentials may result in credit through institutions' prior learning assessment policies.

   ii.   Digital Badge
   A visual representation of one or more microcredentials. Digital badges, in compliance with standards recognized by the Division of Career Technical Education, are embedded with metadata that are verifiable and portable.

b.   CERTIFICATES

   i.   Academic Certificate of Completion
   A credential awarded for completion of a coherent program of study consisting of one (1) to six (6) semester credits ~or less~, representing a coherent body of knowledge that does not lead to an academic undergraduate certificate or a degree.

   ii.   Academic Undergraduate Certificate
   A credential awarded for completion of a coherent program of study consisting of ~ ~seven (7) semester credits or more, representing a coherent body of knowledge that may lead to an academic degree.   Academic undergraduate certificates may be earned as standalone certificates or attached to an undergraduate degree.

iii. Graduate Certificate
A credential awarded for completion of a coherent program of study consisting of nine (9) or more semester credits of graduate course work, representing a coherent body of knowledge that may lead to a degree or may be unique and standalone. Graduate certificates may be earned as standalone certificates or attached to a graduate degree.

iv. ~~Technical Certificate of Completion~~
~~A career technical credential awarded by the institution consisting of seven (7) semester credits or less that represents mastery of a defined set of competencies.~~

v. ~~Basic Technical Certificate~~
~~A credential awarded for completion of requirements in an approved career technical program of at least eight (8) semester credit hours and represents mastery of a defined set of competencies.~~

vi. ~~Intermediate Technical Certificate~~
~~A credential awarded for the completion of requirements in an approved career technical program of at least 30 semester credit hours and represents mastery of a defined set of competencies.~~

vii. ~~Advanced Technical Certificate~~
~~A credential awarded for completion of requirements in an approved career technical program of at least 52 semester credit and represents mastery of a defined set of competencies.~~

iv. Technical Certificate
A credential awarded for completion of requirements in an approved career technical program that represents mastery of a defined set of competencies. Technical certificates are awarded based on a total number of required credits and intended to be stackable:
1) Technical Certificate of Completion – 1 to 7 credits
2) Basic Technical Certificate – 8 to 29 credits
3) Intermediate Technical Certificate – 30 to 51 credits
4) Advanced Technical Certificate – 52 to 59 credits

viii. ~~Microcertification~~
~~A credential in a narrowly focused area within career technical program or academic program that confirms mastery through a formal assessment of a specific industry-related skillset or topic. Completion of multiple microcertification courses may lead to a certificate.~~

~~ix~~v. Specialized Certificate
A credential awarded upon successful completion of specific credit-bearing courses within a career technical or academic program of fewer than 60 semester credits that have been industry validated and sequenced for the

purpose of developing new skills and/or upgrading existing skills in an occupation. Specialized certificates are to be stacked on or appended to other credentials as advanced training. In exceptional cases, stand-alone Specialized Certificates may be proposed if justified by the content of the certificate.

bc. ASSOCIATE OF APPLIED SCIENCE DEGREE: A credential awarded for completion of requirements in an approved career technical program of at least 60 semester credits (includes a minimum of 15 general education credits) and represents mastery of a defined set of competencies. An Advanced option may be awarded for additional credits of at least 15 credit hours that are beyond the A.A.S. degree.

cd. ASSOCIATE DEGREE: A credential awarded for completion of requirements entailing the equivalent of at least 60 semester credits of academic work. An Associate Degree shall not require more than 60 semester credits unless necessary for matriculation to a specific baccalaureate program or for unique accreditation, certification, or professional licensure purposes or by exception approved by the Board.

de. BACCALAUREATE DEGREE: A credential awarded for completion of requirements entailing the equivalent of at least 120 semester credits of academic work. A baccalaureate degree shall not require more than 120 semester credits unless needed for unique accreditation, certification, professional licensure purposes, or by exception approved by the Board.

ef. APPLIED BACCALAUREATE DEGREE: A credential awarded for completion of requirements entailing the equivalent of at least 120 semester credits of academic and career technical coursework (includes a minimum of 36 general education credits). An applied baccalaureate degree shall not require more than 120 semester credits unless needed for unique accreditation, certification, or professional licensure purposes or by exception approved by the Board.

fg. GRADUATE DEGREES: A credential awarded for completion of academic work beyond the baccalaureate degree, including any required research. Graduate degrees consist of master's degrees, specialist degrees, and doctoral degrees.

2. Academic and Career Technical Credit Hour Requirements

A credit hour is an amount of work represented in intended learning outcomes and verified by evidence of student achievement that is an institutionally established equivalency that reasonably approximates not less than:

a. One (1) hour of classroom or direct faculty instruction and a minimum of two hours of out-of-class student work each week for approximately fifteen weeks for one semester hour of credit, or ten to twelve weeks for one quarter hour of credit, or the

equivalent amount of work over a different amount of time; or

b. At least an equivalent amount of work as required in paragraph (a) of this definition for other academic activities as established by the institution, including laboratory work, internships, practica, studio work, and other academic work leading to the award of credit hours.

3. Requirements for Certificates and Degrees

   A postsecondary institution ~~will~~ has authority to establish the number of earned credits required for each certificate and degree. The requirements may differ from the general requirements specified in the definitions in subsection 1; however, all credit requirements must receive Board approval in accordance with the program approval policies provided in Board Policy III.G. Institutional catalogs ~~will~~shall specify the required number of earned credits for each certificate ~~or~~ and degree.

4. Authorization Required

   Programs offered at the institution, as well as the certificates and degrees to which they lead, are subject to review and approval in accordance with the program approval policies provided in Board Policy III.G. A certificate or degree conferred upon the student is conferred under the authority of the Board.

5. Authorized Microcredentials, Certificates, and Degrees

   A current listing of authorized certificates and degrees awarded by each institution is maintained at the institution by the Chief Executive Officer and for all institutions at the Office of the State Board of Education. All microcredentials shall be tracked as digital badges through a platform approved and maintained by the Division of Career Technical Education.

6. Honorary Degrees

   Each institution may award honorary degrees, not to exceed the highest level of Board-authorized degrees currently awarded by the institution, to persons in recognition of distinguished achievements at the local, state, or national level in areas such as education, public service, research, sciences, humanities, business, or other professions. The award of an honorary degree must receive the prior approval of the Chief Executive Officer upon recommendation by the faculty.

   Each institution will develop its own procedures for seeking nominations for and selecting honorary degree recipients. Those procedures may include a statement of eligibility requirements for honorary degrees. However, no person who is currently employed by the institution, is a member of the Board, is~~or~~ ~~the Board's~~ staff of the Office of the State Board of Education, or is an incumbent elected official is eligible for an honorary degree during the term of employment, appointment, or office.

SUBJECT

Board Policy III.Z, Planning and Delivery of Postsecondary Programs and Courses – Second Reading

REFERENCE

October 20, 2016	The Board approved the first reading of the proposed amendments to Board Policy III.Z., updating institutions' statewide program responsibilities.
December 15, 2016	The Board approved the second reading of proposed amendments to Board Policy III.Z.
December 21, 2017	The Board approved the first reading of proposed amendments to Board Policy III.Z., changing the planning timeframe from five years to three years.
February 15, 2018	The Board approved the second reading of proposed amendments to Board Policy III.Z.
June 21, 2018	The Board approved the first reading of proposed amendments to Board Policy III.Z., adding responsibilities for applied baccalaureate degrees to each region.
August 16, 2018	The Board approved the second reading of proposed amendments to Board Policy III.Z.
June 10, 2020	The Board approved the first reading of proposed amendments to Board Policy III.Z., changing the name of a statewide program listed for the University of Idaho.
August 26, 2020	The Board approved the second reading of proposed amendments to Board Policy III.Z.
February 18, 2021	The Board approved the first reading of proposed amendments to Board Policy III.Z that added new definitions for high-demand programs and joint programs.
April 22, 2021	The Board approved the second reading of proposed amendments to Board Policy III.Z.
October, 2022	The Board approved the first reading of proposed amendments to Board Policy III.Z. that described a set of minimum criteria by which the Board will evaluate proposals by the universities to offer new associate degrees and proposals by the community colleges to offer baccalaureate degrees.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies and Procedures, Section III.Z. and Section III.G.
Section 33-113, Idaho Code
Section 33-2107A, Idaho Code

BACKGROUND/DISCUSSION

The purpose of Board Policy III.Z, "is to ensure Idaho's public postsecondary institutions meet the educational and workforce needs of the state through academic planning, alignment of programs and courses, and collaboration and coordination." The purpose is to also meet the statutory requirement to "as far as practicable prevent wasteful duplication of effort" by the institutions.

In spring 2022, the University of Idaho submitted a proposal to the Board requesting approval to offer several associate degrees. In addition, in 2021, several community colleges included bachelor's degrees on their three-year plans. Board members proposed as set of criteria to evaluate these types of requests and asked Board staff to work with the institutions to develop policy language to codify these criteria.

IMPACT

Proposed amendments describe a set of five minimum criteria by which the Board will evaluate proposals by the universities to offer new associate degrees and proposals by the community colleges to offer baccalaureate degrees.

ATTACHMENTS

Attachment 1 – Board Policy III.Z. Planning and Delivery of Postsecondary
Programs and Courses – Second Reading

STAFF COMMENTS AND RECOMMENDATIONS

There were no amendments between the first and second readings. Board staff recommends approval.

BOARD ACTION

I move to approve the second reading of proposed amendments to Board Policy III. Z. Planning and Delivery of Postsecondary Education Programs and Courses as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

ATTACHMENT 1

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: III. POSTSECONDARY AFFAIRS
Subsection: Z. Planning and Delivery of Postsecondary Programs and Courses

~~April 2021~~December 2022

The purpose of this policy is to ensure Idaho's public postsecondary institutions meet the educational and workforce needs of the state through academic planning, alignment of programs and courses (hereinafter referred to collectively as "programs"), and collaboration and coordination. This subsection shall apply to the University of Idaho, Boise State University, Idaho State University, Lewis-Clark State College, College of Eastern Idaho, College of Southern Idaho, College of Western Idaho, and North Idaho College (hereinafter "institutions"). The State Board of Education (the Board) aims to optimize the delivery of academic programs while allowing institutions to grow and develop consistent with their vision and mission with an appropriate alignment of strengths and sharing of resources.

This policy requires the preparation and submission of academic plans to advise and inform the Board in its planning and coordination of educational programs in a manner that enhances access to quality programs, while concurrently increasing efficiency, avoiding unnecessary duplication and maximizing the cost-effective use of educational resources through coordination between institutions. As part of this process, the Board hereby identifies and reinforces the responsibilities of the institutions governed by the Board to deliver Statewide Programs. The provisions set forth herein serve as fundamental principles underlying the planning and delivery of programs pursuant to each institution's assigned Statewide and Service Region Program Responsibilities. These provisions also require collaborative and cooperative agreements, or memorandums of understanding, between and among the institutions.

This policy is applicable to campus-based face-to-face programs, including those that use technology to facilitate and/or supplement a physical classroom experience. It also applies to hybrid and blended programs where a substantial portion of the content is delivered on-line and typically has reduced seat time.

1. Definitions

    a. Designated Institution shall mean an institution whose main campus is located in a service region as identified in subsection 2.b.ii.1) and 2) below; and which possesses the first right to offer programs within its designated service region(s).

        i. With respect to academic programs, Designated Institutions and Partnering Institutions shall have Service Region Program Responsibility for those regions identified in subsection 2.b.ii.1).

        ii. With respect to career technical programs, Designated Institutions and Partnering Institutions shall include only the College of Southern Idaho, College of Western Idaho, North Idaho College, College of Eastern Idaho, Lewis-Clark

<div align="right">**ATTACHMENT 1**</div>

State College, and Idaho State University and shall have Service Region Program Responsibility for those regions identified in subsection 2.b.ii.2).

b. A memorandum of understanding (MOU) is an agreement between two or more institutions offering duplicative programs within the same service region that details how such programs will be delivered in a collaborative manner. An MOU is intended to provide specific, practical details that build upon what has been provided in each Institution's Plan.

c. High-Need Program shall mean a program identified by an institution or the Board as critical to supporting the future growth of a profession.

d. Joint Program shall mean an educational program jointly developed and delivered concurrently by two or more institutions.

e. Partnering Institution shall mean either
   i. an institution whose main campus is located outside of a Designated Institution's identified service region but which, pursuant to a Memorandum of Understanding, offers Regional Programs in the Designated Institution's primary service region, or
   ii. an institution not assigned a Statewide Program Responsibility which, pursuant to a Memorandum of Understanding with the institution assigned the Statewide Program Responsibility, offers and delivers a statewide educational program.

f. Service Region Program shall mean an educational program identified by the Board to be delivered by a Designated Institution within its respective service region that meets regional educational and workforce needs.

g. Service Region Program Responsibility shall mean an institution's responsibility to offer and deliver a Service Region Program to meet regional educational and workforce needs in its primary service region as defined in subsection 2.b.ii.1) and 2) below. Service Region Program Responsibilities are assigned to the Designated Institution in each service region, but may be offered and delivered by Partnering Institutions in accordance with the procedures outlined in this policy.

h. Statewide Program shall mean an educational program identified by the Board to be delivered by a particular institution which meets statewide educational and workforce needs. Lewis-Clark State College, College of Eastern Idaho, North Idaho College, College of Southern Idaho, and College of Western Idaho do not have Statewide Program Responsibilities.

i. Statewide Program Responsibility shall mean an institution's responsibility to offer and deliver a Statewide Program in all regions of the state. Statewide Program Responsibilities are assigned to a specific institution by the Board, taking into account the degree to which such program is uniquely provided by the institution.

2. Planning and Delivery Process and Requirements

   a. Planning

      i. Three-Year Plan

      The Board staff shall, using the Institution Plans submitted, create and maintain a rolling three (3) year academic plan (Three-Year Plan) which includes all current and proposed institution programs. The Three-Year Plan shall be approved by the Board annually at its August Board meeting.

      ii. Institution Plan

      Each institution shall, in accordance with a template to be developed by the Board's Executive Director or designee, create and submit to Board staff a rolling three (3) year academic plan, to be updated annually, that describes all current and proposed programs and services to be offered in alignment with each institution's Statewide and Service Region Program Responsibilities (the Institution Plan). Institution Plans shall be developed pursuant to a process of collaboration and communication with the other institutions in the state.

         1) Statewide Programs

         Institutions assigned a Statewide Program Responsibility shall plan for and determine the best means to deliver such program. Each institution assigned a Statewide Program Responsibility shall include in its Institution Plan all currently offered and proposed programs necessary to respond to the workforce and educational needs of the state relating to such Statewide Program Responsibilities. Each Institution Plan shall include the following information for proposed Statewide programs:

            a) A description of the Statewide Programs to be delivered throughout the state and the anticipated resources to be employed.

            b) A description of the Statewide Programs to be offered by a Designated or Partnering Institution.

            c) A summary of the Memoranda of Understanding (MOUs), if any, to be entered into with Partnering Institutions pursuant to Subsection 2.b.iii. below.

         2) Service Region Programs

         It is the responsibility of the Designated Institution to plan for and determine the best means to deliver Service Region Programs that respond to the educational and workforce needs of its service region. If, in the course of developing or updating its Institution Plan, the Designated Institution identifies a need for the delivery of a program within its service region, and

ATTACHMENT 1

the Designated Institution is unable to provide the program, then the Designated Institution shall coordinate with a Partnering Institution (including institutions with Statewide Program Responsibilities if applicable) located outside of the service region to deliver the program in the service region.

The Institution Plan developed by a Designated Institution shall include the following:

a) A description of the proposed academic programs to be delivered in the service region, or outside of the service region, by the Designated Institution and the anticipated resources to be employed.

b) A description of proposed programs to be offered in the service region by Partnering Institutions, including any anticipated transition of programs to the Designated Institution.

c) A description of proposed Statewide Programs to be offered in the service region by an institution with Statewide Program Responsibilities, or by the Designated Institution in coordination with the institution holding the Statewide Program Responsibility.

d) A summary of proposed MOU's, if any, to be entered into between the Designated Institution and any Partnering Institutions in accordance with Subsection 2.b.iii. below.

e) A summary of collaborative programs created to meet areas designated as high-need.

3) Institution Plan Updates

Institution Plans shall be updated and submitted to Board staff annually as follows:

a) Preliminary Institution Plans shall be developed according to a template provided by the Board's Executive Director or designee and submitted to the Council for Academic Affairs and Programs (CAAP) for review, discussion and coordination annually in April.

b) Following review by CAAP, Institution Plans shall be submitted to Board staff. Upon submission of the Institution Plans to Board staff, the Board's Executive Director or designee shall review the Institution Plans for the purpose of optimizing collaboration and coordination among institutions, ensuring efficient use of resources, and avoiding unnecessary duplication of programs.

c) In the event the Board's Executive Director or designee recommends material changes, he/she shall work with the institutions and then submit

those recommendations to CAAP for discussion prior to submission to the Board for inclusion in the Three-Year Plan.

d) The Board's Executive Director or designee shall then provide their recommendations to the Board for enhancements, if any, to the Institution Plans at a subsequent Board meeting. The Board shall approve the Institution Plans annually through the Three-Year Plan submitted by Board staff. Board approval of Institution Plans acts as a roadmap for institutional planning and does not constitute Board approval of a program. Institutions are still required to follow the standard program approval process as identified in Board Policy Section III.G to gain program approval.

b. Delivery of Programs

i. Statewide Program Delivery
The Board has established statewide program responsibilities for the University of Idaho, Boise State University, and Idaho State University. Each institution must assess the need for, and when determined by the assessment, ensure the statewide delivery of educational programs assigned by the Board. A statewide program list consisting of statewide program responsibilities shall be updated by the Board every two years in accordance with a schedule developed by the Executive Director or designee. The program list will be contained in the Board approved three-year plan document and maintained by Board staff.

ii. High-Demand Programs
The Board recognizes that the need for high-demand, high-need programs may require joint delivery by multiple institutions statewide. These high-demand programs must be delivered through collaboration between institutions in order to preserve rural and statewide access. Service region restrictions and primary institution first rights to offer a program do not apply to Board identified high-demand programs. Criteria for statewide program high-demand designation includes, but is not limited to:

1) Idaho Department of Labor data,
2) Idaho industry demand as demonstrated by unfilled positions and industry data,
3) Demonstrated Idaho state needs for programs supporting underserved populations, and
4) Requested by the Board.

An institution wishing to offer a high-demand program that does not have statewide responsibility in the program area must meet the criteria above, have a signed MOU with the Institution with the Statewide Program Responsibility, and the approval of the Board's Executive Director or designee. At that point, the Partnering Institution shall include the program in its Institution Plan. If the

Board determines that an emergency need exists for a program that the Institution with Statewide Program Responsibility cannot meet, then upon Board approval the two Institutions shall enter into an MOU for the delivery of such program.

iii. Service Region Program Delivery

The Board has established service regions for the institutions based on the six geographic areas identified in Section 33-2101, Idaho Code. A Designated Institution shall have the Service Region Program Responsibility to assess and ensure the delivery of all educational programs and services necessary to meet the educational and workforce needs within its assigned service region.

1) Academic Service Regions

Region I shall include the area within Area No.1 under Section 33-2101, Idaho Code. Lewis-Clark State College, the University of Idaho, and North Idaho College are the Designated Institutions serving undergraduate needs. The University of Idaho is the Designated Institution serving the graduate education needs. Lewis-Clark State College, and North Idaho College are the Designated Institutions serving applied baccalaureate degree needs.

Region II shall include the area within Area No.2 under Section 33-2101, Idaho Code. Lewis-Clark State College and the University of Idaho are the Designated Institutions serving undergraduate needs. The University of Idaho is the Designated Institution serving the graduate education needs.

Region III shall include the area within Area No.3 under Section 33-2101, Idaho Code. Boise State University and College of Western Idaho are the Designated Institutions serving undergraduate needs. Boise State University is the Designated Institution serving graduate education needs. Boise State University and College of Western Idaho are the Designated Institutions serving applied baccalaureate degree needs.

Region IV shall include the area within Area No.4 under Section 33-2101, Idaho Code. Idaho State University and College of Southern Idaho are the Designated Institutions serving undergraduate needs. Idaho State University is the Designated Institution serving the graduate education needs, with the exception that Boise State University will meet undergraduate and graduate business program needs. Idaho State University and College of Southern Idaho are the Designated Institutions serving applied baccalaureate degree needs.

Region V shall include the area within Area No.5 under Section 33-2101, Idaho Code. Idaho State University is the Designated Institution serving undergraduate and graduate education needs.

Region VI shall include the area within Area No.6 under Section 33-2101, Idaho Code. Idaho State University and College of Eastern Idaho are the Designated Institutions serving undergraduate education needs. Idaho State University is the Designated Institution serving the graduate education needs. Idaho State University and College of Eastern Idaho are the Designated Institutions serving applied baccalaureate degree needs.

2) Career Technical Service Regions

Postsecondary career technical education is delivered by six (6) institutions, each having responsibility for serving one of the six geographic areas identified in Section 33-2101.

Region I shall include the area within Area No.1 under Section 33-2101, Idaho Code. North Idaho College is the Designated Institution.

Region II shall include the area within Area No.2 under Section 33-2101, Idaho Code. Lewis-Clark State College is the Designated Institution.

Region III shall include the area within Area No.3 under Section 33-2101, Idaho Code. College of Western Idaho is the Designated Institution

Region IV shall include the area within Area No.4 under Section 33-2101, Idaho Code. College of Southern Idaho is the Designated Institution.

Region V shall include the area within Area No.5 under Section 33-2101, Idaho Code. Idaho State University is the Designated Institution.

Region VI shall include the area within Area No.6 under Section 33-2101, Idaho Code. College of Eastern Idaho is the Designated Institution.

3) Program Offerings by Partnering Institutions

If a Partnering Institution (other than an institution with Statewide Program Responsibilities) identifies a Service Region Program not identified, or anticipated to be identified, in a Designated Institution's Plan, and the Partnering Institution wishes to offer such program in the Designated Institution's service region, then the Partnering Institution may communicate with the Designated Institution for the purpose of allowing the Partnering Institution to deliver such program in the service region and to include the program in the Designated Institution's Plan. In order to include the program in the Designated Institution's Plan, the Partnering Institution must demonstrate the need within the service region for delivery of the program, as determined by the Board (or by the Administrator of the Division of Career Technical Education in the case of career technical level programs). In order to demonstrate the need for the delivery of a program in a service region, the Partnering Institution shall complete and submit to the Chief Academic Officer of the Designated Institution, to CAAP and to Board staff,

in accordance with a schedule to be developed by the Board's Executive Director or designee, the following:

a) A study of business and workforce trends in the service region indicating anticipated, ongoing demand for the educational program to be provided.

b) A survey of potential students evidencing demand by prospective students and attendance sufficient to justify the short-term and long-term costs of delivery of such program.

c) A complete description of the program requested to be delivered, including a plan for the delivery of the program, a timeline for delivery of the program, the anticipated costs of delivery, the resources and support required for delivery (including facilities needs and costs), and program syllabuses.

iv. Associate Degrees at Universities and Baccalaureate Degrees at Community Colleges

When a university proposes to offer an associate degree or a community college proposes to offer a baccalaureate degree, the Board will evaluate the proposed degree using at least the following criteria:

1) Demand

Proposed offerings must be to meet an urgent, local need based on where students who complete the offering will be employed rather than on where the students reside. The demand for the proposed offering needs to be clear, urgent, and compelling, as evidenced through data and industry input. Commitments of practical support (e.g. funding, internships, etc.) from industry stakeholders constitutes evidence of demand.

2) Specialization

The proposed offering must be based on the unique capability at the institution, founded on specialized instructional expertise and any infrastructure necessary for program delivery.

3) Non-Competitiveness

The proposed offering must be non-competitive with other institutions' offerings within the identified service area (whether regional or statewide) and supported by other institutions within the service area. The Executive Director or designee may request written commitments from the presidents of other institutions within the service area expressing conceptual and, if necessary, practical support for the proposed program.

4) Collaboration

Alternative approaches to meeting the identified demand addressed by the proposed offering should be fully considered, including potential collaboration with other institutions. High-demand programs must be offered through inter-institutional collaboration as described in this policy.

5) Resources

The institution must have sufficient resources to develop and deliver the proposed offering.

These criteria do not apply to Associate Degrees in General Studies currently offered or proposed to be offered by the universities.

iv. v. Memoranda of Understanding

The Board encourages and fosters orderly and productive collaboration between Idaho's public institutions. Memoranda of Understanding can support such collaboration.

Institutions proposing to offer a joint program shall develop an MOU to identify the specific roles of each participating institution; the student-related processes associated with delivery of the program; and a timeline for review.

When an institution desires to offer a program already being offered by another institution in the latter institution's service region, an MOU shall be developed between the institutions to offer the program.

If a Designated Institution has identified a workforce or educational need for the delivery of a program within its service region and is unable to provide the program, the Designated Institution may collaborate with a Partnering Institution to offer the program. An MOU will not be required for review or approval prior to implementation in this case. Institutions are required to follow the standard program approval processes as identified in Board Policy III.G to obtain program approval.

An institution with Statewide Program Responsibility need not enter into an MOU with any other institutions before offering the statewide program in service regions outside the service region of the institution with Statewide Program Responsibility. If an institution desires to offer a program for which another institution has Statewide Program Responsibility, the institution that does not have Statewide Program Responsibility shall be required to enter into an MOU with the institution that has Statewide Program Responsibility for that program.

When an institution with Statewide Program Responsibility or Service Region

Program Responsibility desires to offer a program within a service region where such program is currently being offered by another institution, the institutions shall enter into a transition MOU that includes an admissions plan between the institutions providing for continuity in student enrollment during the transition period.

Idaho public postsecondary institutions may enter into MOUs with out-of-state postsecondary institutions or private postsecondary institutions to offer programs. Such MOUs do not require notification or approval by the Board, but shall be shared with the Council on Academic Affairs and Programs. While the Board does not prohibit MOUs with out-of-state postsecondary institutions, agreements with in-state public institutions are preferred.

Articulation agreements between any postsecondary institutions for the purposes of facilitating course or program transfer do not require approval by the Board. Such agreements shall be managed and tracked by the institutions, and shall be reported to the Board on an annual basis as part of the three-year planning process. All articulation agreements must be in compliance with Section 33-3729, Idaho Code, and Board Policy III.V.

All MOUs shall be submitted in conjunction with related program proposals following the standard program approval processes as identified in Board Policy III.G.

v. vi. Facilities

For programs offered by a Partnering Institution (whether an institution with Statewide Program Responsibilities, or otherwise) within a municipal or metropolitan area that encompasses the campus of a Designated Institution, the Partnering Institution's programs offerings shall be conducted in facilities located on the campus of the Designated Institution to the extent the Designated Institution is able to provide adequate and appropriate property or facilities (taking into account financial resources and programmatic considerations), or in facilities immediately adjacent to the campus of the Designated Institution. Renting or building additional facilities shall be allowed only upon Board approval, based on the following:

1) The educational and workforce needs of the local community demand a separate facility at a location other than the campus of the Designated Institution or adjacent thereto as demonstrated in a manner similar to that set forth in Subsection 2.b.ii.1) above, and

2) The use or development of such facilities are not inconsistent with the Designated Institution's Plan.

Facilities rented or built by a Partnering Institution (whether an institution with Statewide Program Responsibilities, or otherwise) on, or immediately adjacent to, the "main" campus of a Designated Institution may be identified (by name)

as a facility of the Partnering Institution, or, if the facility is rented or built jointly by such institutions, as the joint facility of the Partnering Institution and the Designated Institution. Otherwise, facilities utilized and programs offered by one or more Partnering Institutions within a service region shall be designated as "University Place at (name of municipality)."

For programs offered by a Partnering Institution (whether an institution with Statewide Program Responsibilities, or otherwise) within a municipality or metropolitan area encompassing a campus of a Designated Institution, to the extent programmatically possible, auxiliary services (including, but not limited to, bookstore, conference and other auxiliary enterprise services) and student services (including, but not limited to, library, information technology, and other auxiliary student services) shall be provided by the Designated Institution. To the extent programmatically appropriate, registration services shall also be provided by the Designated Institution. It is the goal of the Board that a uniform system of registration ultimately be developed for all institutions governed by the Board. The Designated Institution shall offer these services to students who are enrolled in programs offered by the Partnering Institution in the same manner, or at an increased level of service, where appropriate, as such services are offered to the Designated Institution's students. An MOU between the Designated Institution and the Partnering Institution shall outline how costs for these services will be allocated.

vi. vii.   Duplication of Courses

If courses necessary to complete a Statewide Program are offered by the Designated Institution, they shall be used and articulated into the Statewide Program.

vii. viii.   Discontinuance of Programs

Unless otherwise agreed between the applicable institutions pursuant to an MOU, if, for any reason, (i) a Designated Institution offering programs in its service region that supports a Statewide Program of another institution, (ii) a Partnering Institution offering programs in the service region of a Designated Institution, or (iii) an institution holding a Statewide Program Responsibility offering Statewide Programs in the service region of a Designated Institution, wishes to discontinue offering such program(s), it shall use its best efforts to provide the institution with Statewide or Service Region Program Responsibility, as appropriate, at least one (1) year's written notice of withdrawal, and shall also submit the same written notice to the Board and to oversight and advisory councils. In such case, the institution with Statewide or Service Region Program Responsibilities shall carefully evaluate the workforce need associated with such program and determine whether it is appropriate to provide such program. In no event will the institution responsible for the delivery of a Statewide or Service Region Program be required to offer such program

(except as otherwise provided herein above).

3. Existing Programs

   Programs being offered by a Partnering Institution (whether an institution with Statewide Program Responsibilities, or otherwise) in a service region prior to July 1, 2003, may continue to be offered pursuant to an MOU between the Designated Institution and the Partnering Institution, subject to the transition and notice periods and requirements set forth above.

4. Oversight and Advisory Councils

   The Board acknowledges and supports the role of oversight and advisory councils to assist in coordinating, on an ongoing basis, the operational aspects of delivering programs among multiple institutions in a service region, including necessary resources and support and facility services, and the role of such councils in interacting and coordinating with local and regional advisory committees to address and communicate educational needs indicated by such committees. Such interactions and coordination, however, are subject to the terms of the MOU's entered into between the institutions and the policies set forth herein.

5. Resolutions

   All disputes relating to items addressed in this policy shall be forwarded to the Board's Executive Director or designee for review. The Board's Executive Director or designee shall prescribe the method for resolution. The Board's Executive Director or designee may forward disputes to CAAP and, if necessary, make recommendations regarding resolution to the Board. The Board will serve as the final arbiter of all disputes.

6. Exceptions

   a. This policy is not applicable to programs for which 90% or more of all activity is required or completed online, or dual credit courses for secondary education.

   b. This policy also does not apply to courses and programs specifically contracted to be offered to a private, corporate entity. However, in the event that an institution plans to contract with a private corporate entity (other than private entities in the business of providing educational programs and course) outside of their Service Region, the contracting institution shall notify the Designated Institutions in the Service Region and institutions with Statewide Program Responsibilities, as appropriate. If the corporate entity is located in a municipality that encompasses the campus of a Designated Institution, the Board encourages the contracting institution to include and draw upon the resources of the Designated Institution insomuch as is possible.

SUBJECT
Open Educational Resources (OER) Report

REFERENCE

April 2018	Board received an update on an Open Educational Resources (OER) initiative.
June 2018	Board discussed system-wide access and affordability strategies including OER and requested an inventory and implementation timeline be provided at the October 2018 Board meeting.
August 2018	Board approved a line item request for OER funding.
December 2018	The Board was provided with a timeline and inventory update regarding OER and the total number of course sections delivered exclusively with OER throughout Idaho colleges and universities.
April 2019	The Board was provided with an inventory of common indexed courses for which funding will be focused for OER adoption.
August 2019	The Board approved the first reading of proposed new Board Policy III.U. Textbook and Instructional Material Affordability.
October 2019	The Board approved the second reading of proposed new Board Policy III.U. Textbook and Instructional Material Affordability.
February 2021	The Board temporarily waived the implementation deadline for Board Policy III.U.
April 2021	The Board approved the first reading of proposed amendments to Board Policy III.U. Textbook and Instructional Material Affordability that set expectations for goal-oriented, institution-specific, and measurable access and affordability initiatives at Idaho institutions.
June 2021	The Board approved the second reading of proposed amendments to Board Policy III.U. Textbook and Instructional Material Affordability

APPLICABLE STATUTE, RULE, OR POLICY
Idaho State Board of Education Governing Policies & Procedures, Section III.U.

BACKGROUND/DISCUSSION
The cost of instructional materials for college students continues to far outpace the rate of inflation. The American Enterprise Institute reported that textbook costs rose 182 percent between 1998 and 2016[1], and other sources report an increase of over 1,000 percent since the 1970s[2]. Over the past several years, institutions

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[1] https://www.aei.org/carpe-diem/chart-of-the-day-the-astronomical-rise-in-college-textbook-prices-vs-consumer-prices-and-recreational-books/
[2] https://www.nbcnews.com/feature/freshman-year/college-textbook-prices-have-risen-812-percent-1978-n399926

across the United States, including in Idaho, have responded to this alarming trend by deploying cost-saving programs and other measures to help students access more affordable instructional materials. These collective actions have likely helped stem the rise in textbook costs, which appear to have leveled off. However, despite recent plateaus in textbook cost prices, a 2021 survey of 5,000 college students at 80 U.S. institutions revealed that 65% of students did not purchase a textbook for a class because of affordability concerns, despite believing that going without required materials would negatively impact their grades.[3] This report indicated that student access to instructional materials has gotten worse as a result of the COVID-19 pandemic, compounded by other factors like loss of employment, unreliable internet access, and food insecurity.

The Board envisions a student-centered education system that creates opportunities for all Idahoans to improve their quality of life. To achieve this vision, the Board prioritizes access to educational opportunities for all, regardless of geography or socioeconomic status. Increasing access to, and affordability, of instructional materials in higher education is a critical part of accomplishing this vision.

In October 2019, the Board adopted a new policy, Board Policy III.U. Textbook and Instructional Material Affordability, to establish minimum standards for textbook affordability at Idaho's four-year public institutions. An amended version of this policy was approved by the Board in June 2021, after receiving input from faculty and academic leaders at all eight postsecondary institutions. The policy positions Open Educational Resources (OER) as the primary element of institutions' textbook affordability plans. In particular, the policy requires the four-year institutions to develop plans to increase access and affordability of instructional materials. The policy defines several required elements that must be included in the plans and identifies several optional elements that institutions may consider including in their plans. The policy also requires institutions to submit their plans to the Board office and provide annual reports on the implementation and outcomes of the plans.

All eight institutions submitted plans in summer 2022. The community colleges submitted their plans in response to the $1M in funding provided by the Legislature in FY2022 to support the development of Zero Textbook Cost Degrees, or pathways that allow students to complete an associate degree for zero or very low instructional materials' cost.

Additionally, in Spring 2022, the Board office conducted a survey of faculty to better understand their course-level efforts to increase access and affordability of instructional materials and their practices and perceptions related to OER. Faculty who taught courses with reliably zero or very low instructional materials' costs were asked to complete the survey.

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[3] https://uspirg.org/reports/usp/fixing-broken-textbook-market-third-edition

Finally, the Board Office has recently allocated $50K per year ongoing to support the Open Pedagogy, Advocacy and Leadership (OPAL) Fellowship program, which supports faculty in adapting, adopting, and creating OER, as well as helping them become leaders in the open education movement in Idaho and beyond.

IMPACT

The new requirements in Board Policy III.U led all eight institutions to establish clear strategic plans for increasing access and affordability to instructional materials over the past year. Many institutions created task forces or workgroups comprised of stakeholders from across campus to develop these plans. For example, Boise State University has established an "Affordable Learning Committee" with a charge to "act as a mechanism to gather together key stakeholders including student, faculty, instructor, and staff representation" in support of the goals of the institution's plan. All institutional plans address the elements required by policy, and many address several optional elements as well.

The OER Faculty Survey revealed that many faculty across the state actively use OER, understand its purpose and promise, and consider student financial needs in deciding which instructional materials to assign.

The OPAL Fellowship is in its second round, with 19 faculty from across the state participating in the program this academic year. An initial 13 fellows participated in the previous academic year. Many of these faculty have produced new OER that are hosted on the Idaho Open Press[4], a repository of openly licensed, locally developed content maintained by the Board Office.

ATTACHMENTS

Attachment 1 – OER Report Presentation
Attachment 2 – Institutional Plans to Increase Instructional Materials Access and Affordability - 2022

STAFF COMMENTS AND RECOMMENDATIONS

Increasing access and affordability of instructional materials requires significant culture change among faculty and academic leaders. Many productive examples of such culture change already exist in Idaho. The new version of the policy promotes best practices that have already proven successful within and beyond Idaho and encourages new, practical experimentation in scaling access and affordability efforts across our state. In particular, the requirements for institutional plans place the responsibility for establishing relevant goals and outcomes squarely on the shoulders of the institutions—allowing each to attend to its unique contexts while also encouraging collaboration on common interests and programs (e.g., common-indexed GEM courses, shared degree pathways, etc.).

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[4] https://idaho.pressbooks.pub/

The policy requirements are supported by the funding allocated from the legislature and the Board Office for open education-related initiatives, including an initial legislative investment of $50K for supporting faculty to develop open textbooks, an ongoing Board Office investment of $50K annually to support the Openness in Pedagogy, Advocacy and Leadership (OPAL) Fellowship program, and $1M in FY 2022 for Zero Textbook Cost Degrees in the community colleges.

BOARD ACTION

This item is for informational purposes.

Open Educational Resources (OER) Report

December 21, 2022

1.
OER - A Brief Overview
Open Educational Resources

An International Definition of OER

Open Educational Resources (OER) are learning, teaching and research materials in any format and medium that reside in the public domain or are under copyright that have been released under an open license, that permit no-cost access, re-use, re-purpose, adaptation and redistribution by others.

-UNESCO Recommendation on OER, 2019

https://www.unesco.org/en/legal-affairs/recommendation-open-educational-resources-oer

UNESCO

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Idaho's Definition

Open Educational Resources (OER) are learning, teaching and research materials that reside in the public domain or are have been released under an intellectual property license copyright, such as a Creative Commons license, that permits free use and repurposing by others.

-Board Policy III.U. Instructional Materials Access and Affordability, 2021

https://boardofed.idaho.gov/board-policies-rules/board-policies/higher-education-affairs-section-iii/iii-u-instructional-materials-access-and-affordability/

Idaho State
Board of Education

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Purpose of OER

Recognizing that, in building inclusive knowledge societies, Open Educational Resources (OER) can support quality education that is equitable, inclusive, open and participatory as well as enhance academic freedom and professional autonomy of teachers by widening the scope of materials available for teaching and learning,

-UNESCO Recommendation on OER, 2019

https://www.unesco.org/en/legal-affairs/recommendation-open-educational-resources-oer

UNESCO

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An OER Timeline

Learning Objects and "Open Content"

The expansion of the Internet leads to new ways of thinking about course content development and distribution; David Wiley coins the term "open content" in 1998.
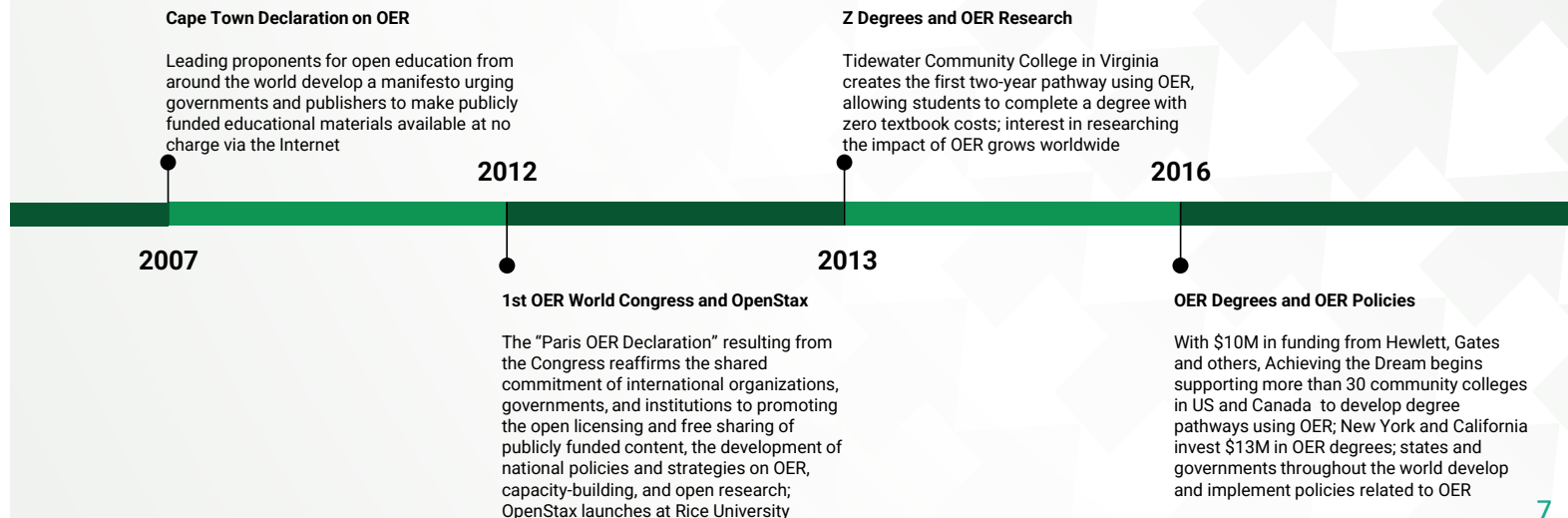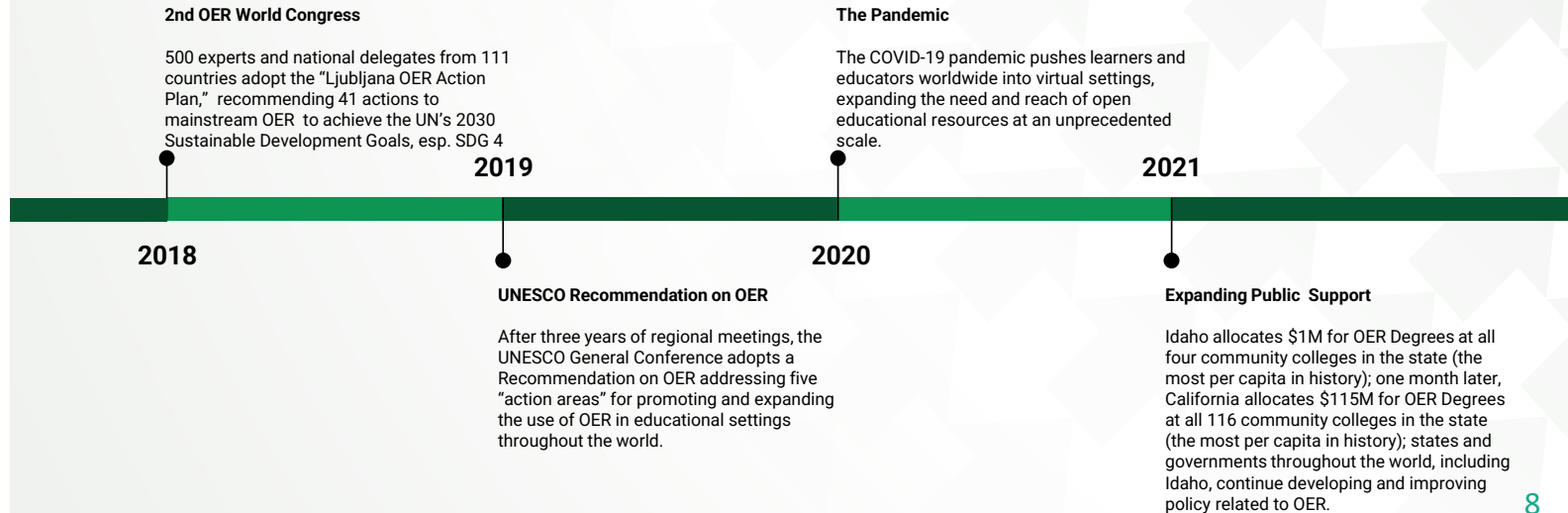
"Open Educational Resources" First Defined

A UNESCO Forum on OpenCourseWare leads to agreement among international participants on the name "Open Educational Resources" and an initial definition.

2001

2005

1990s

2002

Creative Commons and MIT's OCW

With funding from the Hewlett Foundation and others, Larry Lessig *et. al* found Creative Commons in the wake of the U.S. Supreme Court's copyright extension decision; MIT launches the revolutionary OpenCourseWare project to extend MIT courses to a worldwide digital audience for free.

OECD Study on OER

OECD's Centre for Educational Research and Innovation (CERI) launches a study to analyse and map the scale and scope of initiatives regarding "open educational resources" in terms of their purpose, content, and funding.

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An OER Timeline

Cape Town Declaration on OER

Leading proponents for open education from around the world develop a manifesto urging governments and publishers to make publicly funded educational materials available at no charge via the Internet

Z Degrees and OER Research

Tidewater Community College in Virginia creates the first two-year pathway using OER, allowing students to complete a degree with zero textbook costs; interest in researching the impact of OER grows worldwide

2012

2016

2007

2013

1st OER World Congress and OpenStax

The "Paris OER Declaration" resulting from the Congress reaffirms the shared commitment of international organizations, governments, and institutions to promoting the open licensing and free sharing of publicly funded content, the development of national policies and strategies on OER, capacity-building, and open research; OpenStax launches at Rice University

OER Degrees and OER Policies

With $10M in funding from Hewlett, Gates and others, Achieving the Dream begins supporting more than 30 community colleges in US and Canada to develop degree pathways using OER; New York and California invest $13M in OER degrees; states and governments throughout the world develop and implement policies related to OER

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An OER Timeline

2nd OER World Congress

500 experts and national delegates from 111 countries adopt the "Ljubljana OER Action Plan," recommending 41 actions to mainstream OER to achieve the UN's 2030 Sustainable Development Goals, esp. SDG 4

The Pandemic

The COVID-19 pandemic pushes learners and educators worldwide into virtual settings, expanding the need and reach of open educational resources at an unprecedented scale.

2019

2021

2018

2020

UNESCO Recommendation on OER

After three years of regional meetings, the UNESCO General Conference adopts a Recommendation on OER addressing five "action areas" for promoting and expanding the use of OER in educational settings throughout the world.

Expanding Public Support

Idaho allocates $1M for OER Degrees at all four community colleges in the state (the most per capita in history); one month later, California allocates $115M for OER Degrees at all 116 community colleges in the state (the most per capita in history); states and governments throughout the world, including Idaho, continue developing and improving policy related to OER.

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More Recent Research

Clinton and Kahn, 2019

A meta-analysis examining learning performance of 100,012 students (22 studies) found equivalent learning between open and commercial textbooks.

An examination of withdrawal rates of 78,593 students (11 studies) found that courses with open textbooks had withdrawal rates that were 29% lower than courses with commercial textbooks.

https://journals.sagepub.com/doi/full/10.1177/2332858419872212

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3.

Board Support for OER

OPAL, ZTC Degree, Policy III.U.

HB 267, Section 5, 2019

SECTION 5. OPEN EDUCATION RESOURCES. Of the amount appropriated in Section 1 of this act for open education resources, up to $50,000 from the General Fund shall be used to pilot open education resources for postsecondary courses. Selection of the eligible course(s) for the pilot shall include consideration of the number of students taking the course systemwide, the cost of traditional textbooks associated with the course, and availability of the course to secondary students through dual credit. Development of the open education resources shall be collaborative and serviceable to general education courses at no less than four (4) postsecondary institutions.

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OPAL Fellowship Program

Openness: Regular, statewide engagement with affinity/inquiry groups

⇨   Statewide opportunities to directly influence policies

⇨   Weekly open office hours on relevant topics

Pedagogy: Aligning priorities with teaching/learning goals

⇨   Interoperable teaching and learning tools/opportunities available

⇨   Interinstitutional, discipline-specific professional development opportunities

Advocacy: Formal recognition and promotion of effective practice

⇨   Comprehensive policy/literature reviews for interpolicy oversights

⇨   Reliable systems of faculty/student support and recognition

Leadership: Giving power to those closest to the pain

⇨   Multi-semester inter-institutional faculty fellowships

⇨   Original research and publication

13
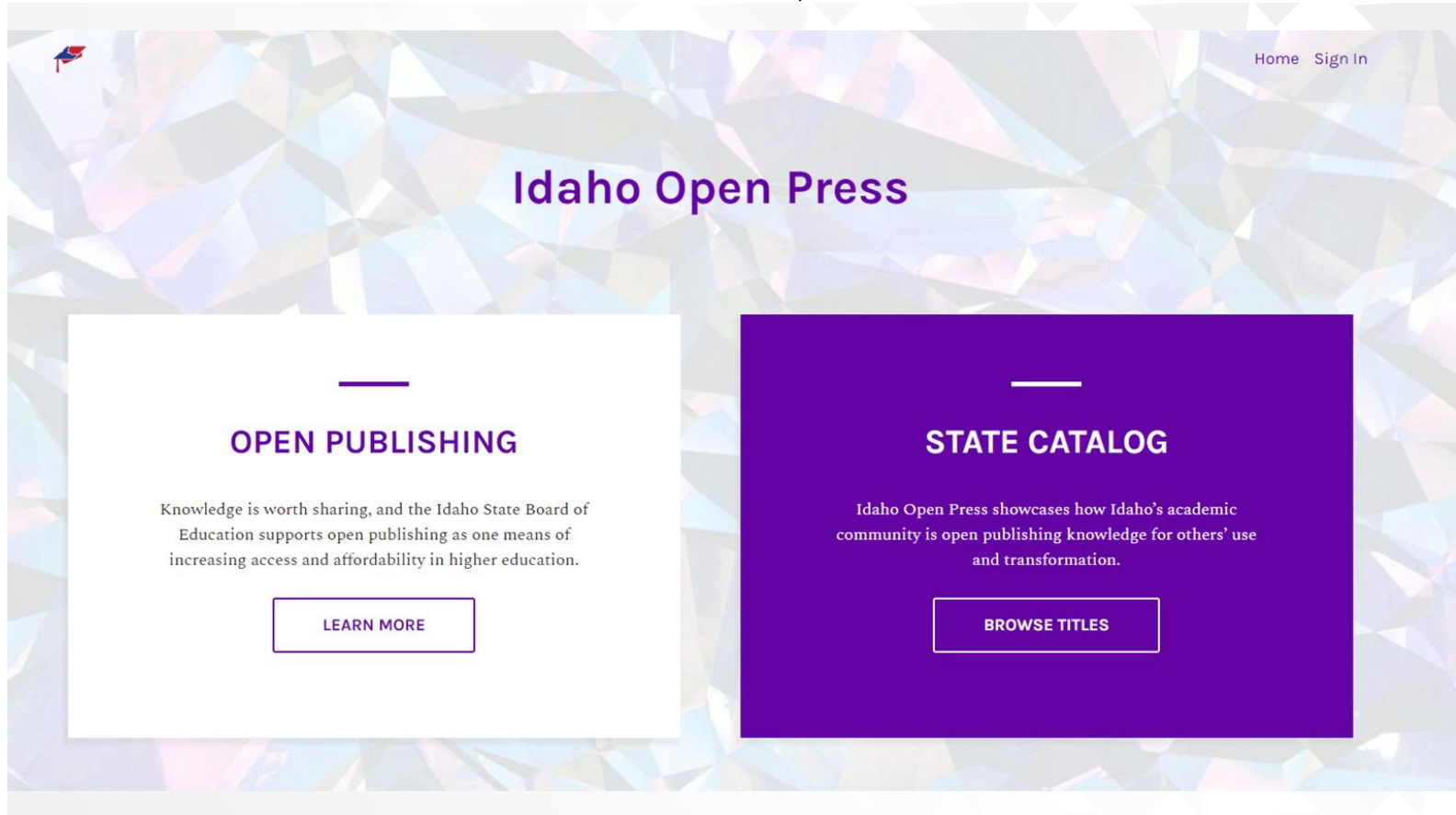
Project Z-Degree Will Make College More Affordable

By Kurt Liebich, President, Idaho State Board of Education

The 'Z' in Project Z-degree stands for 'zero cost' and the goal is to make it possible for students to earn an associate degree with zero or very low textbook costs.

The Idaho Legislature and Governor Brad Little jump-started this change initiative by investing $1 million in Project Z-degree earlier this year as part of the Governor's "Building Idaho's Future" initiative.

The money will be used to help community college faculty who choose to participate in the effort transition their courses to zero-cost or very low-cost instructional materials such as open educational resources, or OER. "It really

Policy III.U. Instructional Materials Access and Affordability

⇨ Definitions

→ Automatic Charge

→ Course Marking

→ Instructional Materials

→ Cost (zero, very low, low, mid, high)

→ Open Educational Resources

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Policy III.U. Instructional Materials Access and Affordability

⇨ Institution Plans (Required Elements)
- → **Resources and support for faculty to ensure accessibility of materials**
- → **Institutional policies and strategies to minimizing material costs and promote OER**
- → **Professional Development for faculty re: OER**
- → **Course marking processes for some courses**
- → **Strategies for using OER in common-indexed courses (gen-ed)**

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Policy III.U. Instructional Materials Access and Affordability

⇨ Institution Plans (Optional Elements)
  → Course marking process for all courses
  → **Strategies for using OER in other courses (beyond gen-ed)**
  → **Institutional policies that encourage faculty to be intentional in material selection**
  → **Inclusion of access and affordability efforts in Tenure & Promotion**

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4.

Survey of Faculty Use of OER

April 2022
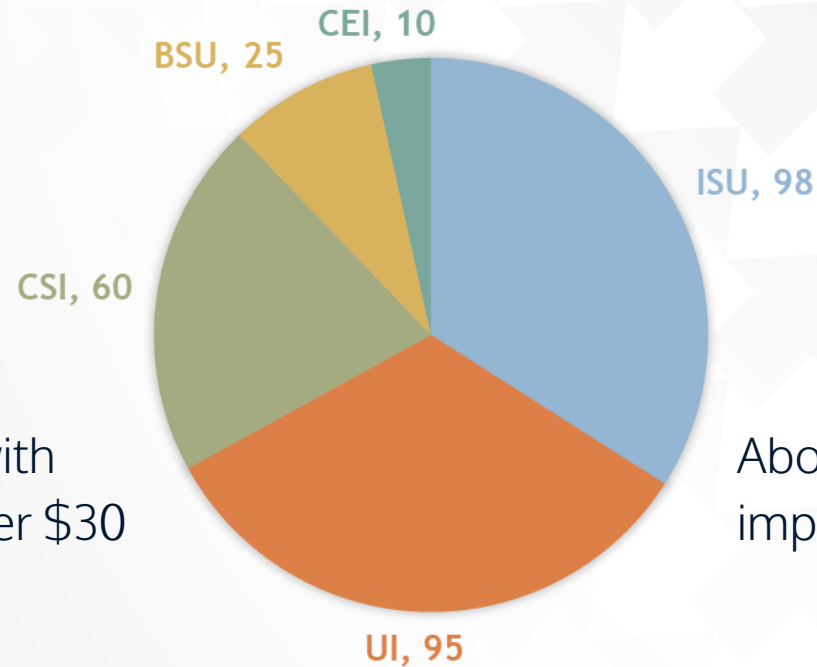
Types of Material Required*
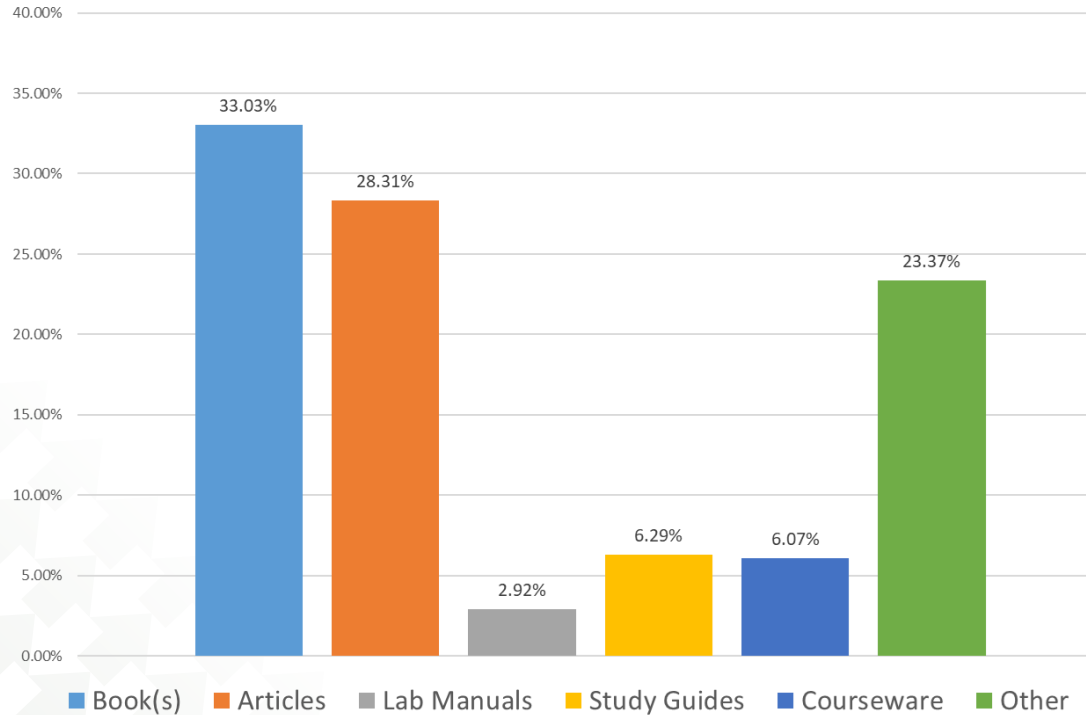
*285 Courses

How Students Access Materials*

*275 Courses

22

TAB 4 Page 22

ATTACHMENT 1

Automatic Charge Use*

*272 Courses

IRSA

TAB 4 Page 23
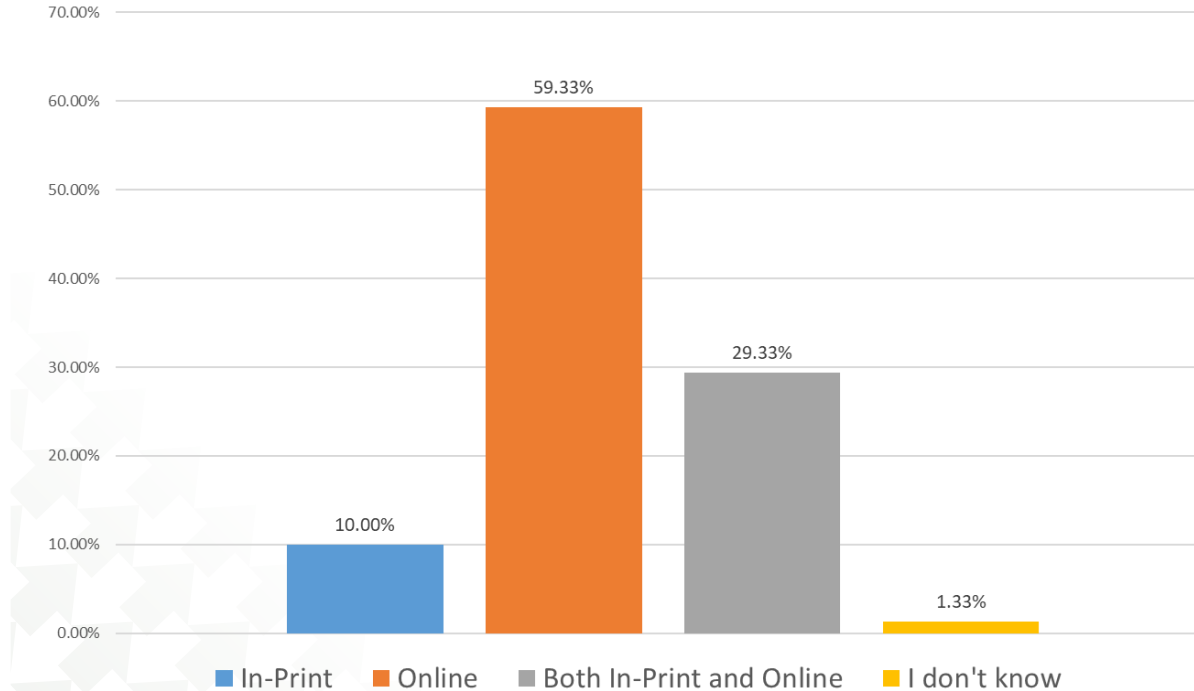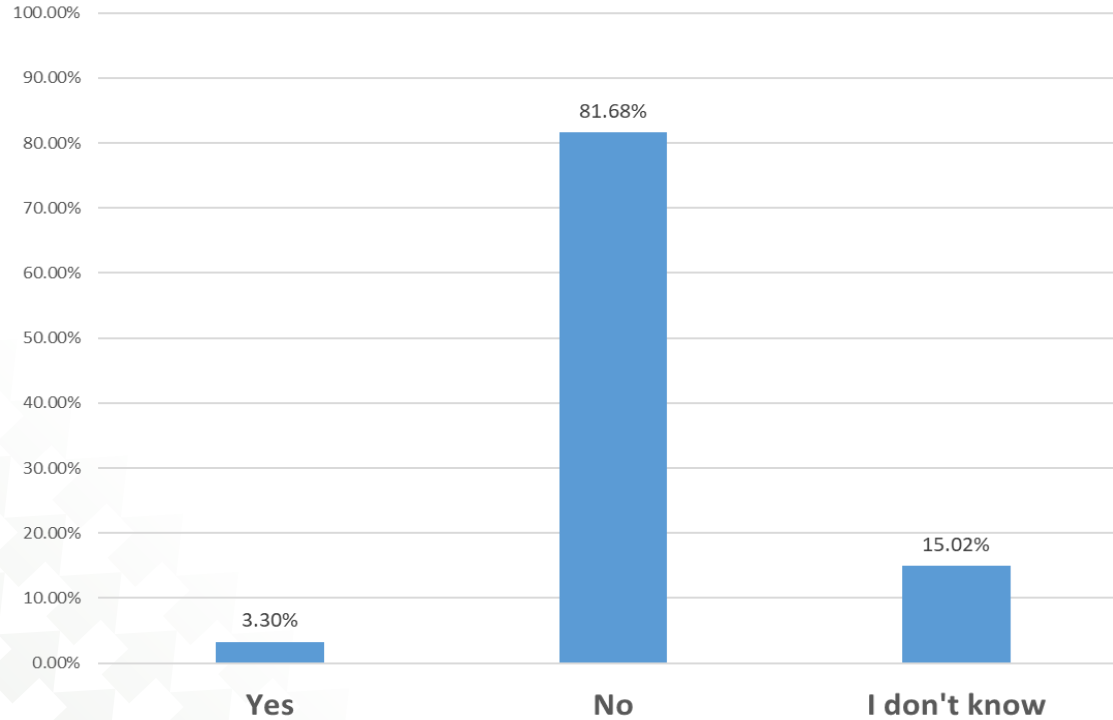
23

Faculty Familiarity with OER*
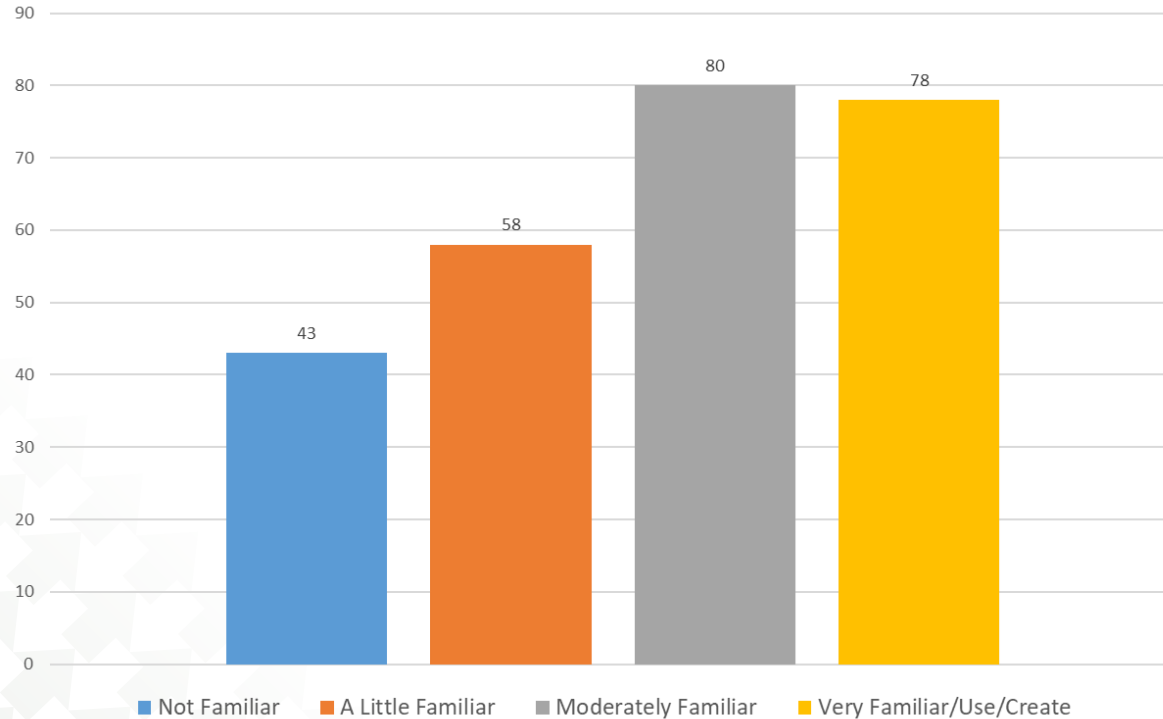
*259 Courses

24

TAB 4 Page 24

Faculty Use of OER*

*270 Courses

25
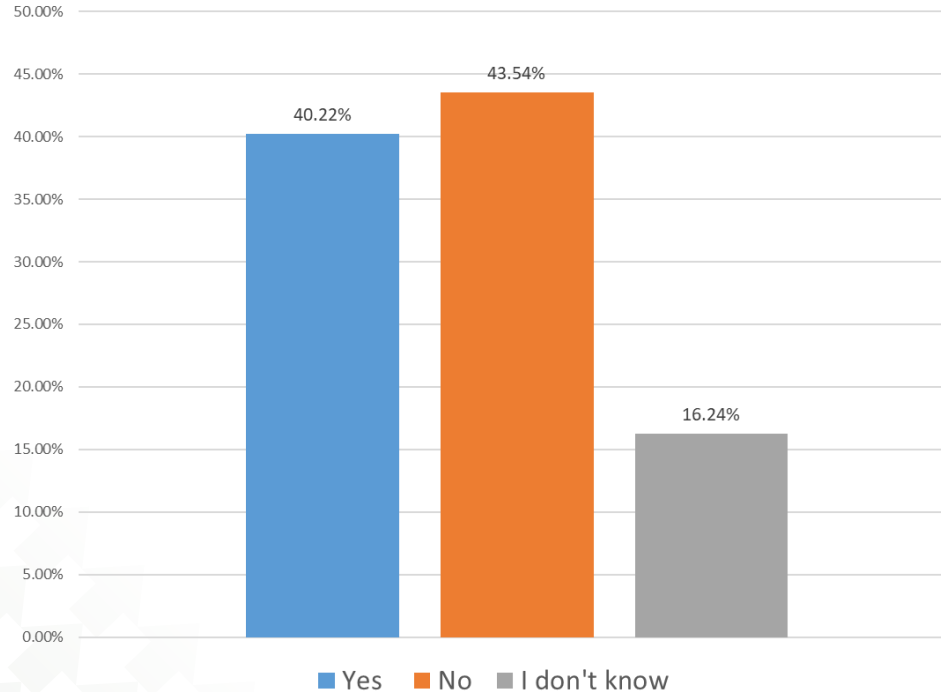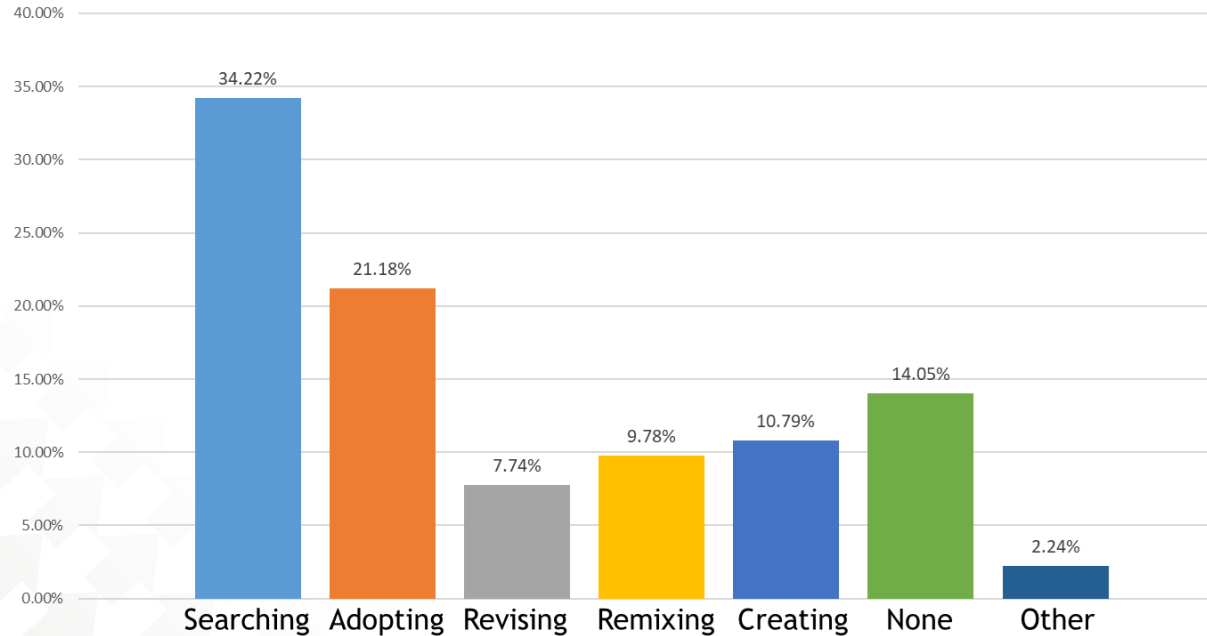
OER Use by Institution*

ATTACHMENT 1

*290 Courses

27

IRSA

TAB 4 Page 27
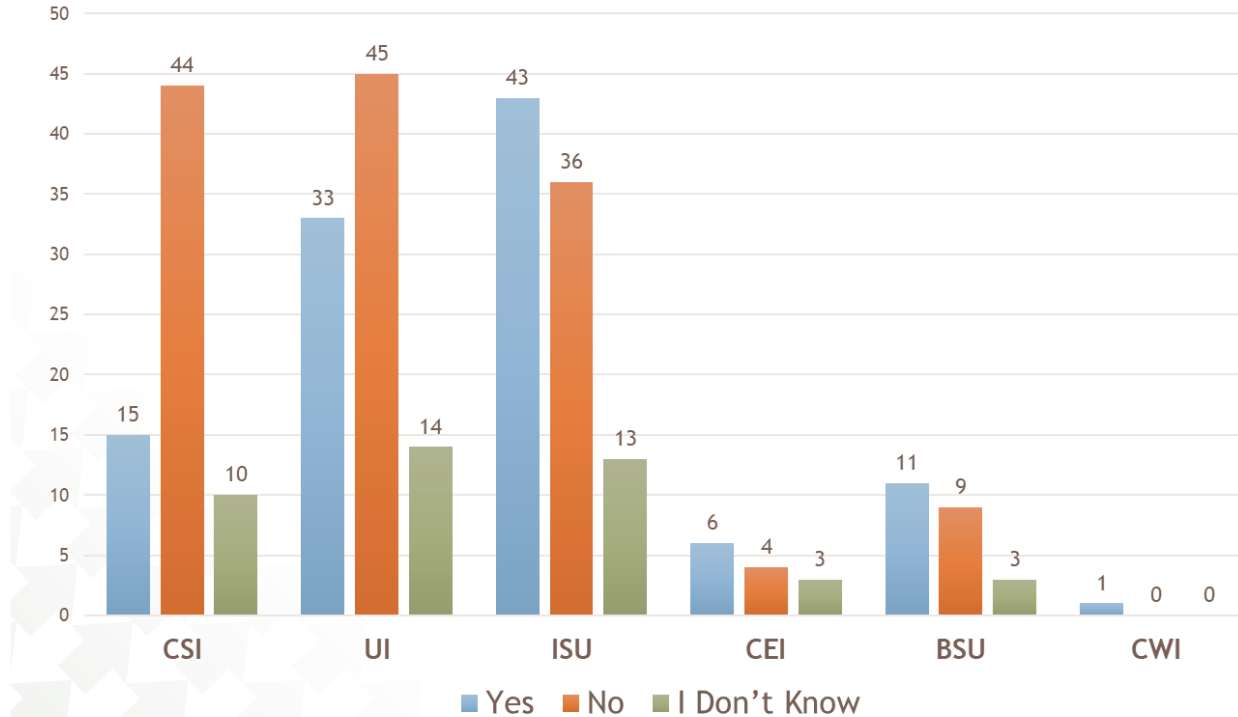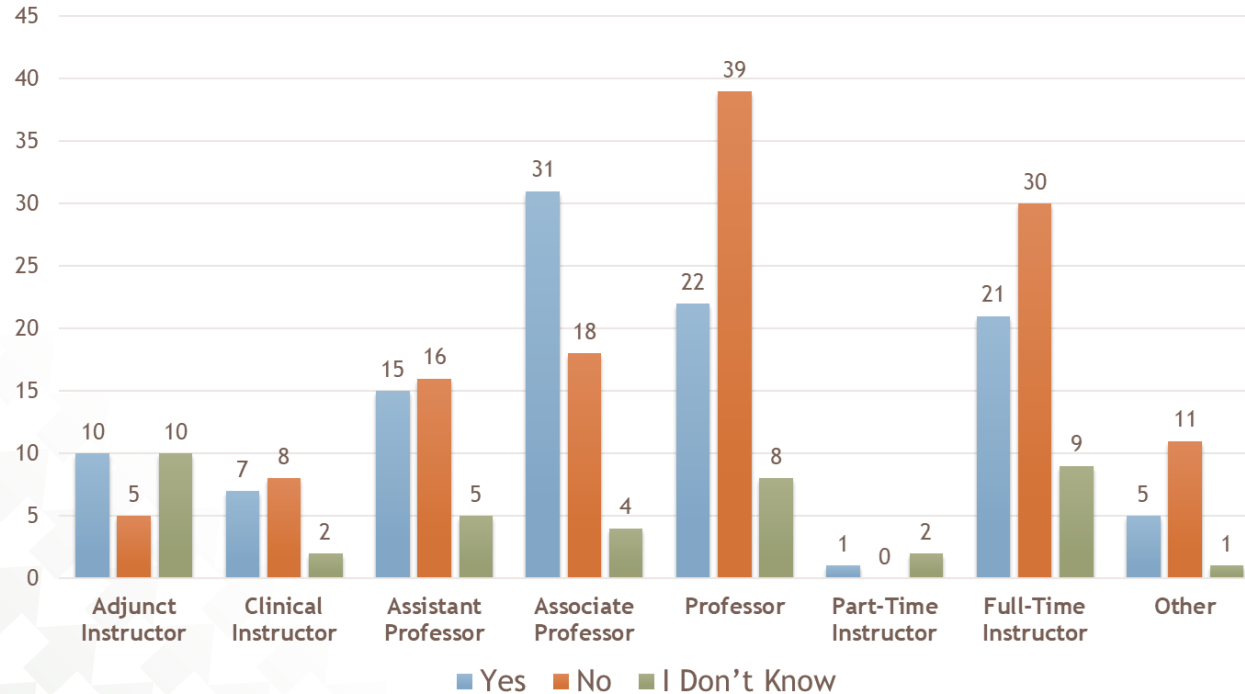
OER Use by Major Discipline*
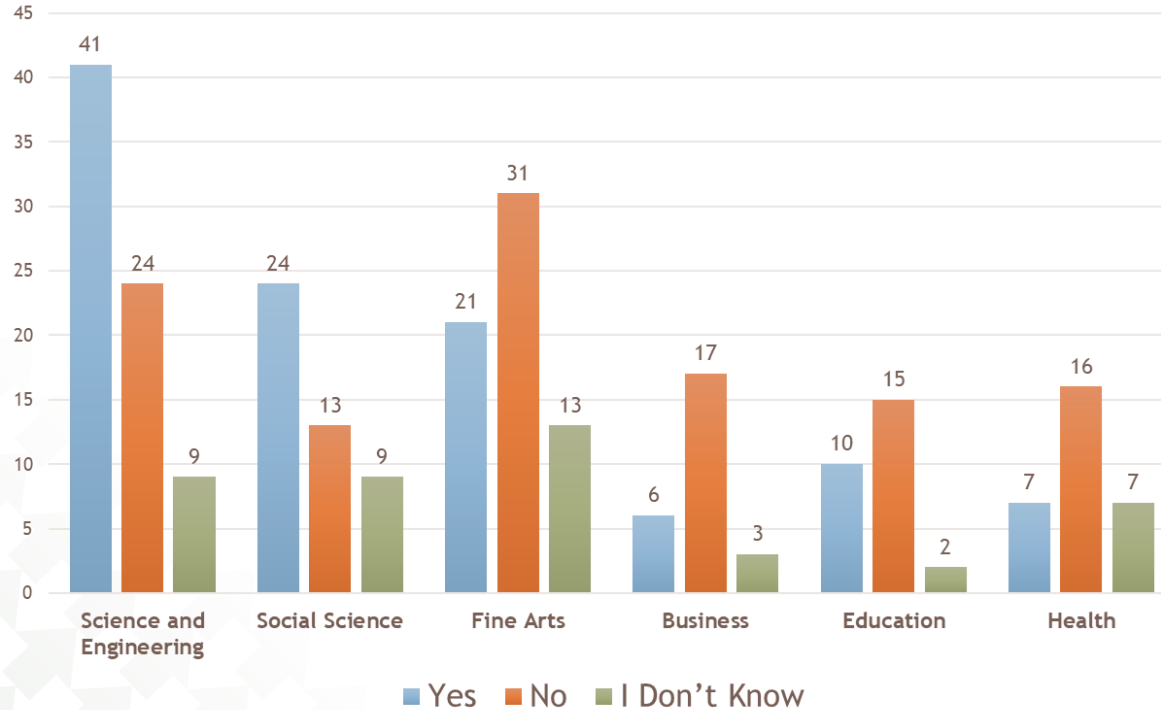
*286 Courses

Thanks!

Any questions?

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Institutional Plans to Increase Instructional Materials Access and Affordability

2022

Table of Contents

Affordable Learning Initiative Action Plan

Context

After input from faculty senate representatives from around the state of Idaho as well as representatives from community colleges, the State Board of Education passed Policy III. U, Instructional Material Access and Affordability during the summer of 2021. This policy requires postsecondary institutions to develop a plan in support of access and affordability of learning materials.

Policy III. U. asks that plans address the following elements:

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially those who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*
- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*
- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*

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- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*
- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*
- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*
- *Course marking processes at the time of course schedule releases that indicate course sections that reliably require the purchase of, including an automatic charge for, any access codes for instructional materials.*
- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low cost instructional materials in common indexed courses as articulated in Board Policy III.N.6.b, including dual credit courses.*

Although open educational resources (OER) are a component of the required plans, the policy addresses affordability of learning materials in a broader sense. Therefore, in order to move a plan forward for Boise State University in a thoughtful manner, it needed to include voices from diverse campus stakeholders. At the end of 2021, the Provost's Office appointed a Learning Materials Access and Affordability (LMAA) Task Force charged with the development of a university plan in support of access and affordability of instructional materials.

Introduction

Boise State University seeks to support and encourage faculty in transitioning their courses, where possible, to affordable learning materials, including alternatives to traditional textbooks. For the purposes of this work, we define affordable learning materials as materials that do not incur a significant additional per semester cost for students. These solutions may include both free and very low-cost (no more than $30 total list price per course) resources.

In compiling this plan we acknowledge the following guiding principles: that students come first; that we as a campus are committed to affordability, access, and accessibility of learning materials for all; and that academic freedom of instructors is essential. Throughout this plan the

LMAA Task Force discusses affordable learning as encompassing a number of course material types that might be considered affordable. Among the spectrum of course material options the Task Force evaluated attributes for inclusion such as those outlined in Figure 1: free to students, duration of access, accessibility, availability on day-one of a course, etc. Affordable learning in the context of this plan refers to the following three categories of learning materials:

Open Educational Resources "are learning, teaching and research materials in any format and medium that reside in the public domain or are under copyright that have been released under an open license, that permit no-cost access, re-use, adaptation and redistribution by others." (UNESCO)

Open Access Content "is digital, online, free of charge, and free of most copyright and licensing restrictions. What makes it possible is the internet and the consent of the author or copyright-holder." (Suber, 2004)

Library Licensed Content are library collections (primarily online materials) that can be used in the classroom. This can include an array of materials such as streaming video, chapters from multi-user ebooks, case studies, articles from journals, and more. Materials such as these can be linked as an e-reserve or within the learning management system (Jensen, n.d.). Library licensed content represents materials that reside behind a paywall and are inaccessible to students without an active Boise State University log-in.

While Boise State University encourages the adoption, revision and/or development of open educational resources, we understand that they may not be the best option for all courses. We affirm instructor choice in selecting resources that maintain excellent teaching and learning outcomes in their disciplines.

IS THE RESOURCE...

	Public domain or openly licensed?	Available when a course starts?	Available in perpetuity?	Free from cost in at least one form to students?	Free from personal data sharing?
OPEN EDUCATIONAL RESOURCES (OER)	☑ Always	☑ Always	☑ Always	☑ Always	☑ Always
PRINTED COMMERCIAL MATERIALS RENTAL	☒ Never	≈ Sometimes	☒ Never	☒ Never	≈ Sometimes
LIBRARY RESOURCES	∼ Rarely	≈ Sometimes	☒ Never	☑ Always	☑ Always
LOW-COST PRINT OPTIONS OR COMPLIMENTARY RESOURCES OF OER	☑ Always	≈ Sometimes	☑ Always	☒ Never	≈ Often
USED BOOKS OR OTHER ALL RIGHTS RESERVED MATERIALS WITH LOWER COSTS	☒ Never	≈ Sometimes	≈ Sometimes	≈ Sometimes	≈ Often
INCLUSIVE ACCESS	∼ Rarely	≈ Often	☒ Never	☒ Never	☒ Never

The answers in this table are generalized; they may be different in different contexts.

Figure 1. A comparison table of how frequently different types of learning materials (e.g. OER, printed commercial materials, inclusive access) are openly licensed, available when a course starts, available in perpetuity, free from cost to students in at least one form, and free from personal data sharing (Zaback, 2022).

Three primary groups were identified as being actively involved in facilitating access to, and supporting the creation of, affordable learning materials: Albertsons Library, Boise State OER Group, and the Center for Teaching and Learning. There was recognition that this work was also supported through numerous efforts across campus including the Bronco Shop, eCampus Center, Educational Access Center, and Learning Technology Solutions. While significant work has been done across campus to grow and advocate for OER in particular, led by the efforts of the OER Group (a driven community of practice), it was fragmented in nature and unable to support instructors campus-wide.

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A central challenge in understanding the extent to which faculty have adopted affordable learning materials is the fact there is a significant deficit of harvested, detailed data at Boise State University around this subject. The OER Group shared that they have often discussed methods for collecting such information on a large scale, but the task was outside the scope of an informal group. The campus bookstore has an option to designate OER as a course material when faculty fill out course material requirements for their courses, but this data is not comprehensive and messaging does not provide a definition of OER to instructors which may lessen self-identification. The library attempts to collect information about library-licensed material usage in the classroom when items are ordered, but this data is piecemeal in nature. Finally, both the OER Group and the eCampus Center have offered grant opportunities in the past to encourage the adoption, adaptation, or creation of OER by instructors of online programs. Data based around these grant programs is available, but does not capture courses or instructors working outside of eCampus Center supported programs, thus representing an incomplete picture of the campus landscape.

Using the information gathered from the environmental scan, the LMAA Task Force collaboratively prioritized four primary categories to focus their efforts: accessibility, assessment, course marking, and OER. LMAA aligned existing efforts that connected directly to these categories as well as identified areas for growth at Boise State. This phase of our process was crucial to having an accurate picture of current services, staffing, and potential gaps to address in order to support affordable learning.

Action Items

After the environmental scan phase the LMAA Task Force was able to identify four primary action items. These action items reflect what is possible without significant additional monetary or workforce investment. They outline methods for a collaborative, across-campus approach to support instructors in learning about and adopting affordable learning materials at the

instructors' own pace, and propose opportunities to collect data around affordable learning to track and assess progress.

Action Item 1 - Establish and Promote Affordable Learning Services

This action item seeks to align existing services (see Appendix A: Current Affordable Learning Services) with Boise State's Affordable Learning Initiative. The goal is to develop a framework for instructors to be able to easily access services that support affordable learning.

This goal will be achieved through development of a web presence that directs instructors to the services that support affordable learning at Boise State. This website will act as a single access point to provide clarity for instructors to know what support is available within the scope of affordable learning. Content will include information for training, tools, points of contact, etc. This approach will help units where these services live ensure timely communication of resources to instructors, and support necessary referrals to other units on campus. The website will also serve as a platform to share select assessment outcomes of Boise State's Affordable Learning Initiative.

Estimated timeline	Partners	Additional Partners
Initial Website Development • 3-6 months *Website Maintenance (e.g. responding to user experience, adding new services)* • Ongoing	Albertsons Library, Bronco Shop, Center for Teaching and Learning, eCampus Center, Educational Access Center, Learning Technology Solutions, Office of the Registrar, University Foundations	Office of Information Technology, IT Accessibility Committee

Assessment Strategies
(See Appendix B: Sample Assessment Strategies)

Website
- Analyze the environmental scan data from LMAA as a framework for creating this one access point for affordable learning.
- Utilize university web analytics to track usage data, trends, popular pages, etc.
- Survey of affordable learning partners to evaluate improvement in communication of resources, ease of referrals to other services, and suggested additions.

Policy III.U.

Action Item 1 addresses portions of the following elements of Policy III.U.:
- Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).
- Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.

Blueprint for Success

Action Item 1 connects to the following goals and strategies of Boise State's Strategic Plan:
- Goal 1 - Improve Educational Access and Student Success
  We can enhance the comprehensive student experience with a focus on student success and post-graduate outcomes.
  - Strategy 3 - Expand educational access for all Idahoans through improved outreach, communication, financial aid, philanthropy, online resources and education.
  - Strategy 4 - Cultivate a commitment to high-quality, new and innovative learning experiences in all courses, curricula and co-curricula.

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Action Item 2 - Appoint an Affordable Learning Committee

In order to maintain momentum on the work the LMAA Task Force has begun, form a campus-level Affordable Learning Committee under the guidance of the Provost's office. This committee will act as a mechanism to gather together key stakeholders including student, faculty, instructor, and staff representation. The committee's charge should consider responsibilities for implementation of Boise State's Affordable Learning Initiative such as:

- Compile the annual report on the implementation and outcomes of the affordable learning work for submission to the SBOE.

- Continue to evaluate existing course schedules and course material adoption workflows and platforms to develop a process for course marking for both zero and very low-cost courses.

- Determine essential data to collect in the course marking processes to allow for ongoing assessment of the impact of the Affordable Learning Initiative on teaching and learning at Boise State.

- Make recommendations to university administration for new policies and incentive structures tied to the Affordable Learning Initiative. Maintain an awareness of how policies and incentive structures support diverse instructor types (e.g. tenure track faculty and tenured faculty, lecturers, adjunct instructors, clinical faculty).

- Provide input on whether new programs fall within the scope of Affordable Learning at Boise State.

- Facilitate conversations for how faculty may view their OER efforts in tenure and promotion processes as part of their workload assignments per Policy 4.1.4. See Appendix C: OER in Tenure and Promotion Resources for examples.

Estimated timeline	Partners	Additional Partners
*Note this is a sequential timeline. *Forming a Committee* • 3-6 months *Determine Essential Data to Collect* • 3-6 months *Course Marking* • 3-6 months for continued research • 9-12 months for trial implementation *Policy / Incentive Structure Recommendations* • Ongoing *Annual Report* • Prepare annually each spring semester	Albertsons Library, Bronco Shop, Center for Teaching and Learning, Faculty Senate, Office of the Registrar, Student Senate	eCampus Center, Educational Access Center, Learning Technology Solutions, University Foundations

Assessment Strategies *(See Appendix B: Sample Assessment Strategies)*
Annual Report • Analysis of overall data from campus stakeholders in affordable learning, including statistics form from Action Item 3 assessment. • Benchmark progress in each part of the action plan and make adjustments for future iterations as needed.
Course Marking • As early iterations of course marking occur, maintain documentation on lessons learned to ensure knowledge management for the future. • In coordination with the registrar's office, capture the actual number of sections that reside within the zero to very low-cost range over time as well as the enrollment data for those sections. • In coordination with Bronco Shop and Library, capture data on learning material types that fall within the scope of affordable learning.
Incentive Structures • Survey partners (e.g. Center for Teaching and Learning) to capture both qualitative perspective of incentive structures as well as quantitative data regarding number of instructors supported, queries for specific types of incentive opportunities, etc.
Committee Scope & Progress • Conduct a pre/post survey of committee members each academic year.

Policy III.U.

Action Item 2 addresses portions of the following elements of Policy III.U.:
- Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.
- Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.
- Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost of very low cost, as defined in this policy.
- Course marking processes at the time of course schedule releases that indicate course sections that reliably require the purchase of, including an automatic charge for, any access codes for instructional materials.
- Strategies with measurable goals for improving and using readily available and relevant OER or other very low cost instructional materials in common indexed courses as articulated in Board Policy III.N.6.b, including dual credit courses.
- Inclusion of efforts to increase access and affordability of instructional materials as part of tenure and promotion processes.

Blueprint for Success

Action Item 2 connects to the following goals and strategies of Boise State's Strategic Plan:
- Goal 4 - Foster Thriving Community
  We will promote and advance a fair, equitable and accessible environment to enable all members of the campus community to make a living, make a life and make a difference.
  - Strategy 2 - Create a comprehensive, whole-employee experience that aligns university resources and is designed to enhance employee well-being and career growth at the university.
  - Strategy 3 - Create a transparent, centralized business operations model that responsibly uses university resources, supports collaboration, and promotes consistency across individual campus units.

Action Item 3 - Design and Implement Training

Center for Teaching and Learning, Albertsons Library, and Educational Access Center to collaboratively assess existing training structures such as New Faculty Orientation, Ten for Teaching, Faculty Learning Communities, etc. and identify opportunities to integrate, scaffold, and amplify training focused around accessibility of course materials, open educational resources, and copyright considerations. These groups will also work to create mechanisms for instructors to share about their affordable learning efforts. In addition, these groups will revise and build upon existing workshop materials, as well as consider new possibilities such as an OER Certification. Utilize the website from Action Item 1 as a single access point to these training opportunities.

This action item will build upon existing educational infrastructure at Boise State and provide equitable professional development opportunities for instructors throughout their career at the university.

Estimated timeline	Partners	Additional Partners
Assess Existing Training • 3-4 months *Outline Gaps* • 4-9 months *Develop Modules, Curriculum, etc. to Address Gaps* • 4-6 months	Albertsons Library, Center for Teaching and Learning, Educational Access Center	eCampus Center, IT Accessibility Committee, Learning Technology Solutions, OER Group

Assessment Strategies *(See Appendix B: Sample Assessment Strategies)*
Pre-Training Development • Conduct a campus-wide survey to all instructors tailored toward barriers to OER use to learn what training would be most useful. • Partner with the IT Accessibility Committee to determine where they have identified gaps.

Training Implementation
- Track the number of attendees completing training opportunities.
- Align attendees with colleges in order to identify trends for future targeted outreach.
- Track the role of attendees within the university in order to determine if the training supports diverse instructor audiences.

User Experience
- Design a brief pre/post assessment for attendees when they attend training.
- Follow-up via email with attendees the following semester to see how they may be implementing what they learned.

Targeted Outreach
- Identify units across campus whose instructors may not be aware of these trainings and directly promote opportunities to these units, including instructors of common indexed courses.
- Work with the IT Accessibility Committee to learn about effectiveness of accessibility policies and additional messaging to incorporate.
- Determine effectiveness through enrollment data and course materials utilized.

Policy III.U.

Action Item 3 addresses portions of the following elements of Policy III.U.:
- Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.
- Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.
- Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.
- Strategies with measurable goals for improving and using readily available and relevant OER or other very low cost instructional materials in common indexed courses as articulated in Board Policy III.N.6.b, including dual credit courses.

Blueprint for Success

Action Item 3 connects to the following goals and strategies of Boise State's Strategic Plan:
- Goal 1 - Improve Educational Access and Student Success
  We can enhance the comprehensive student experience with a focus on student success and post-graduate outcomes.
    - Strategy 4 - Cultivate a commitment to high-quality, new and innovative learning experiences in all courses, curricula and co-curricula.
- Goal 2 - Innovation for Institutional Impact

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> We will expand and implement leading-edge innovations to provide access to integrated high-quality teaching, service, research and creative activities.
> - Strategy 2 - Build scalable university structures and align philanthropic and strategic investments that support innovation.
> - Goal 4 - Foster Thriving Community
>   We will promote and advance a fair, equitable and accessible environment to enable all members of the campus community to make a living, make a life and make a difference.
>   - Strategy 2 - Create a comprehensive, whole-employee experience that aligns university resources and is designed to enhance employee well-being and career growth at the university.

Action Item 4 - Communication and Promotion

This action item ties to Action Items 1-3 with the goal of clearly communicating university services to support affordable learning and accessibility of course materials. Regular updates to instructors about opportunities to learn about existing services and new opportunities to engage with affordable learning at Boise State will be crucial to building a campus culture around these efforts. Part of this work is to address existing messaging channels that align with the scope of affordable learning at Boise State (e.g. course materials adoption process via Bronco Shop).

This action item relies on Action Item 1 to achieve a cohesive user experience through one primary access point to both information about and materials to support affordable learning. Action Item 4 also has a goal of promoting courses that fall into the zero-cost and low-cost categories as defined by SBOE to the student body. Over time, this action item connects to sharing and promoting the outcomes and impacts of the Affordable Learning Initiative to campus and beyond.

Estimated timeline	Partners	Additional Resources & Partners
• Ongoing	Affordable Learning Committee, Albertsons Library, Bronco Shop, Center for Teaching and Learning	Campus Update, OER Group, Office of Communications and Marketing

Assessment Strategies
(See Appendix B: Sample Assessment Strategies)
Faculty Inquiries   Develop a single statistics form for Affordable Learning. Train groups that instructors regularly contact for help (e.g. eCampus, Albertsons Library, Bronco Shop) on using the statistics form. Coordinate with the Affordable Learning Committee on this task.
Marketing Campaigns   Social media engagement (e.g. likes, shares, etc.).
Communication Effectiveness   - Design a brief "how are we doing" survey intended to gauge user confidence that can be embedded into the website and marketing emails as needed.   - Lead focus groups with instructors to understand the user experience and where they are encountering institutional barriers.

Policy III.U.
Action Item 4 addresses portions of the following elements of Policy III.U.:   - Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially those who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).   - Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.   - Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.   - Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.   - Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.

Blueprint for Success
Action Item 4 connects to the following goals and strategies of Boise State's Strategic Plan: Goal 1 - Improve Educational Access and Student Success

We can enhance the comprehensive student experience with a focus on student success and post-graduate outcomes.

- Strategy 3 - Expand educational access for all Idahoans through improved outreach, communication, financial aid, philanthropy, online resources and education.
- Strategy 4 - Cultivate a commitment to high-quality, new and innovative learning experiences in all courses, curricula and co-curricula.

• Goal 2 - Foster Thriving Community
We will promote and advance a fair, equitable and accessible environment to enable all members of the campus community to make a living, make a life and make a difference.

- Strategy 3 - Create a transparent, centralized business operations model that responsibly uses university resources, supports collaboration, and promotes consistency across individual campus units.

These action items have the potential, over time, to support student success and lifelong learning by providing alternative options to traditional textbooks. Boise State has a diverse student population, with over 21% of our undergraduates over the age of 25 (Boise State, 2020). A U.S. PIRG update tied to student basic needs during the Covid-19 pandemic found that access to course materials from traditional publishers and ed tech companies "pose numerous problems for students, such as their lack of instructor flexibility, reliance on a strong wifi connection, and student data privacy" (2020). Supporting affordable learning means supporting students. The LMAA Task Force recognizes that for these Action Items to be successful long-term, we need to empower the Boise State community to engage with affordable learning and associated services consistently across campus, and provide stewardship for the implementation of this action plan.

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Submitted on May 16th, 2022 by Boise State University's Learning Materials Access and Affordability Task Force:

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- Wendy Turner, Director, Educational Access Center
- Amy Vecchione, Assistant Director, eCampus Research and Innovation

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- Dr. Pete Koetsier, President, Boise State University Faculty Senate
- Amy Mayton, Coordinator of Scheduling, Office of the Registrar
- Dr. Susan Shadle, Vice Provost for Undergraduate Studies
- Dr. Anders Tobiason, Multimedia Development and User Experience Librarian, Albertsons Library

Groups
- Associated Students of Boise State University
  - Executive Council: Kenneth Huston, ASBSU President; Sarah Smith, ASBSU Vice President; Amaia Gurricabeitia, Administrative Director; Graf Kirk, Associate Vice President of Academic Affairs; Grace Burgert, Associate Vice President of Inclusive Excellence; Kayla Magana, Associate Vice President of Student Organizational Affairs; Taite Griffin, Ethics Officer; Samantha Muvihill, Government Relations Officer; Eric Kline, Communications Officer.
- Boise State University Deans Group
- Boise State University Faculty Senate
- Open Educational Resources Group

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Appendix A: Current Affordable Learning Services

Service Description	Primary Boise State Service Department / Division	Service Notes
Access to digital course materials (non-OER)	Albertsons Library, Acquisitions & Collections	https://www.boisestate.edu/library/collections/
Access to digitized primary sources	Albertsons Library, Special Collections, Acquisitions & Collections	
Access to government documents	Albertsons Library, Acquisitions & Collections	
Accessibility checks and consultations	Albertsons Library, Scholarly Communications and Data Management, Instruction & Research Services	
Accessibility tools: Ally, Adobe DC Pro, etc.	Learning Technology Solutions	https://boisestate.atlassian.net/wiki/spaces/LTS/pages/92110851/Ally+Basics
Library licensed content adoption & implementation consults	Albertsons Library, Instruction & Research Services, Acquisitions & Collections	
OER adoption & implementation consults	Albertsons Library, Scholarly Communications and Data Management, Instruction & Research Services	
OER grant incentives	Center for Teaching and Learning / State Board of Education	https://www.boisestate.edu/ctl/programs-2/infuse-grant/ https://idaho.pressbooks.pub/opal/

Service Description	Primary Boise State Service Department / Division	Service Notes
OER publishing platforms: Institutional Repository, Pressbooks	Albertsons Library - Scholarly Communications and Data Management / Learning Technology Solutions / State Board of Education	https://scholarworks.boisestate.edu/ https://boisestate.pressbooks.pub/ https://www.oercommons.org/groups/boise-state-oer/2032/
Online course and program accessibility checks and consultations	eCampus Center, Development and Support Team	
Online OER adoption & implementation consults	eCampus Center, Development and Support team, Research and Innovation Team	
Open access content adoption & implementation consults	Albertsons Library, Scholarly Communications and Data Management, Instruction & Research Services	
Preservation of Boise State created course materials	Albertsons Library, Scholarly Communications and Data Management	https://scholarworks.boisestate.edu/
Workshops and training on accessibility	Center for Teaching and Learning / OIT / Educational Access Center	https://www.boisestate.edu/oit-training/calendar-of-classes/wordpress/ https://www.boisestate.edu/accessibility/accessibility-101/web-content-accessibility-micro-certification-badge/
Workshops and training on copyright	Albertsons Library, Scholarly Communications and Data Management / Center for Teaching and Learning	

Service Description	Primary Boise State Service Department / Division	Service Notes
Workshops on Open Education	Albertsons Library - Scholarly Communications and Data Management, Instruction & Research Services / Center for Teaching and Learning / eCampus Center / OER Group / State Board of Education	https://open.umn.edu/oen/members

Appendix B: Sample Assessment Strategies

1. Sample Survey Questions for the targeted survey for High Enrollment Course Instructors:
   - Are you aware of the concept of Affordable Learning Materials?
   - What measures have you taken to investigate the affordability of the instructional materials for your course?
   - What actions have you taken to learn more about how to make your course materials more affordable for your students?
   - Have you ever taken training on Affordable Learning Materials, and if so please describe it?
   - Do you know who to ask regarding, or where to find answers to, your questions regarding affordable instructional materials for your course?

2. Using enrollment data analyze whether courses marked as using Affordable Learning Materials see increased enrollment after adoption and marking the course as such.

   This will require that the marking is clearly explained and will only be able to be measured after a clear marketing campaign that explains what affordable learning means and how it benefits students.

3. Create focus groups of students enrolled in courses designated as using Affordable Learning Materials.

   Create a survey for these focus groups that include questions such as:

   - Did you specifically enroll in this course because of the Affordable Learning designation?
   - Describe your experience using the course materials.
   - What were the advantages/disadvantages of using Affordable Learning Materials?
   - Open discussion on Affordable learning.

   After conducting these focus groups, use the feedback to create a marketing campaign to target both instructors and students. For instructors this campaign would be targeted to help them understand the benefits of adopting Affordable Learning Materials. For the students, it would help them understand how much Affordable Learning benefits them, and how they can know what courses fall into this category.

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4. Data from a single statistics form.

   On a regular basis, pull data from the single statistics form and analyze it for patterns including where instructors are most likely to start their inquiry (the department or person they asked), in what departments the instructors teach in, what kinds of courses the instructors teach, etc.

   Then follow up with instructors to see if their questions were answered and where they are in the process of adopting Affordable Learning Materials.

5. Affordable Learning Materials Adoption Training

   For existing courses that add in Affordable Learning Materials adoption track the participation numbers, the faculty type, college, courses taught, etc. Coordinate with CTL in their existing assessment data, and add in a brief survey with questions specifically geared towards Affordable Learning.

   For new courses or certificates, track the same usage data as above.

   Create a more robust survey including questions like:

   - Why did you decide to take this course?
   - What do you plan to change in terms of instructional materials after taking this course?
   - What do you think the adoption of Affordable Learning materials can mean for student success?

Appendix C: OER in Tenure and Promotion Resources

Organization Name	Resource Description	Resource Notes
Driving OER Sustainability for Student Success (DOERS3)	Tenure and Promotion Matrix	https://www.doers3.org/tenure-and-promotion.html
Iowa Open Education Action Team (Iowa OER)	Handouts for Advocates and Self-Advocacy	https://oept.pubpub.org/
BC Campus	Making OER Count Webinar	https://bccampus.ca/event/making-oer-count-incorporating-oer-into-the-tenure-and-promotion-process/

LEARNING RESOURCE AFFORDABILITY PLAN*
COLLEGE OF EASTERN IDAHO
8-17-2022

Introduction

The cost of textbooks has been a longstanding barrier to student access and affordability. According to the Educational Data Initiative website:

- In 2021 students spent an average of $1420 at public two-year colleges.

- Research shows that many students will also avoid buying textbooks, if at all possible.

- In 2020, 19% of students indicated material costs of a class influence what course they take.

As reported by faculty members and those in student affairs, students attending the College of Eastern Idaho sometimes forego obtaining the textbook altogether and attempt to make it through the course without necessary materials. First-generation students may not even be aware that they are required to purchase textbooks and not know the high costs and variability of textbook selection and adoption. Many students attend the first week of classes without textbooks and quickly fall behind.

While national data indicate that the total cost of textbooks has declined since 2016, it remains a barrier. The College of Eastern Idaho is committed to a mitigation of textbook and/or learning resource costs with the end goal of adding several "zero added textbook cost degrees," where students secure their learning resources as a function of their course registration. This will have the effect of:

- Student relief from additional costs of textbooks and other learning resources so there are no "added cost" surprises

- Students will have access to their resources on day one of the course and be fully equipped to succeed

- Equitable access to designated courses/pathways in the schedule, rather than searching for a course with the lowest textbook cost

- Improved access to higher education and student success

While CEI is not subject to Idaho State Board of Education *Policy III.U. Instructional Material Access and Affordability*, which provides the universities guidance and sets expectations, the College has made the commitment to adhere as best it can to the policy in good faith.

Current activity

In Spring 2022, CEI's Office of the Vice President of Academic & Student Affairs requested the formation of a committee with the express purpose of determining how best to gradually move toward the ultimate goal of creating a Zero Cost Textbook Degree. Two employees were selected to co-chair the committee, including a faculty member and an instructional designer with a deep back ground in OER materials. The committee, made up of faculty and staff members, has met and made great progress towards the creation of the degree. All classes have been identified in an Associate of Arts degree. The committee is currently working with the office of the registrar to mark the courses a student would take to obtain an AA degree while expending zero cost towards textbooks.

This analysis not only creates a snapshot of current faculty commitments to keeping costs low but creates a goal or target for the total cost of the initiative. The following are some of the strategies needed to accomplish this goal.

- Faculty dedication and commitment to sensitivity around textbook costs

- Continued deployment of inclusive access

- Use of the CEI Library as a resource

- Institutional support

- Minimal course fees in lieu of textbook purchases

- Development and adoption of open education resources (OER)

The College is currently participating in a new community college statewide OER initiative (Project Z-Degree), which will provide $1 million to be split across the four community colleges, to support this effort over the next few years. However, textbook adoption and selection remains a primary role of faculty, and the institution fully supports this academic freedom right.

Plan

According to policy III.U. the institutional plan is to consist of the following elements at a minimum. For each of the elements, institutional comment is provided.

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*

  o This is accomplished through institutional program review, outcomes assessment, and textbook adoption processes, along with input from the Student Disability Services.

- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*

  o As stated earlier, the CEI faculty have made these commitments as an inherent function of their positions. However, during the process of textbook adoption and selection review, the College will undertake to reasonably create parameters around selection that are consistent with the language in the policy.

- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*

  o Will be accomplished through the deployment of Project Z-Degree (the community college OER project).

- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*

    o Deans and Department Chairs will work with faculty to ensure faculty have the resources and development they need to feel comfortable adopting low cost materials

- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*

- A function of Project Z-Degree including significant collaboration between institutions.

- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*

  - Course marking will be deployed as soon as possible within the registrar's office.

- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*

  - This will be a component of the plans cited above in the first two bullet points as well as those set forth in the conditions of Project Z-Degree, e.g. a zero textbook cost major developed at each Idaho community college.

* Adapted from College of Southern Idaho's Plan

LEARNING RESOURCE AFFORDABILITY PLAN*
COLLEGE OF EASTERN IDAHO
8-17-2022

Introduction

The cost of textbooks has been a longstanding barrier to student access and affordability. According to the Educational Data Initiative website:

- In 2021 students spent an average of $1420 at public two-year colleges.

- Research shows that many students will also avoid buying textbooks, if at all possible.

- In 2020, 19% of students indicated material costs of a class influence what course they take.

As reported by faculty members and those in student affairs, students attending the College of Eastern Idaho sometimes forego obtaining the textbook altogether and attempt to make it through the course without necessary materials. First-generation students may not even be aware that they are required to purchase textbooks and not know the high costs and variability of textbook selection and adoption. Many students attend the first week of classes without textbooks and quickly fall behind.

While national data indicate that the total cost of textbooks has declined since 2016, it remains a barrier. The College of Eastern Idaho is committed to a mitigation of textbook and/or learning resource costs with the end goal of adding several "zero added textbook cost degrees," where students secure their learning resources as a function of their course registration. This will have the effect of:

- Student relief from additional costs of textbooks and other learning resources so there are no "added cost" surprises

- Students will have access to their resources on day one of the course and be fully equipped to succeed

- Equitable access to designated courses/pathways in the schedule, rather than searching for a course with the lowest textbook cost

- Improved access to higher education and student success

While CEI is not subject to Idaho State Board of Education *Policy III.U. Instructional Material Access and Affordability*, which provides the universities guidance and sets expectations, the College has made the commitment to adhere as best it can to the policy in good faith.

Current activity

In Spring 2022, CEI's Office of the Vice President of Academic & Student Affairs requested the formation of a committee with the express purpose of determining how best to gradually move toward the ultimate goal of creating a Zero Cost Textbook Degree. Two employees were selected to co-chair the committee, including a faculty member and an instructional designer with a deep back ground in OER materials. The committee, made up of faculty and staff members, has met and made great progress towards the creation of the degree. All classes have been identified in an Associate of Arts degree. The committee is currently working with the office of the registrar to mark the courses a student would take to obtain an AA degree while expending zero cost towards textbooks.

This analysis not only creates a snapshot of current faculty commitments to keeping costs low but creates a goal or target for the total cost of the initiative. The following are some of the strategies needed to accomplish this goal.

- Faculty dedication and commitment to sensitivity around textbook costs

- Continued deployment of inclusive access

- Use of the CEI Library as a resource

- Institutional support

- Minimal course fees in lieu of textbook purchases

- Development and adoption of open education resources (OER)

The College is currently participating in a new community college statewide OER initiative (Project Z-Degree), which will provide $1 million to be split across the four community colleges, to support this effort over the next few years. However, textbook adoption and selection remains a primary role of faculty, and the institution fully supports this academic freedom right.

Plan

According to policy III.U. the institutional plan is to consist of the following elements at a minimum. For each of the elements, institutional comment is provided.

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*

  o This is accomplished through institutional program review, outcomes assessment, and textbook adoption processes, along with input from the Student Disability Services.

- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*

  o As stated earlier, the CEI faculty have made these commitments as an inherent function of their positions. However, during the process of textbook adoption and selection review, the College will undertake to reasonably create parameters around selection that are consistent with the language in the policy.

- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*

  o Will be accomplished through the deployment of Project Z-Degree (the community college OER project).

- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*

  o Deans and Department Chairs will work with faculty to ensure faculty have the resources and development they need to feel comfortable adopting low cost materials

- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*

      o   A function of Project Z-Degree including significant collaboration between institutions.

- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*

      o   Course marking will be deployed as soon as possible within the registrar's office.

- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*

      o   This will be a component of the plans cited above in the first two bullet points as well as those set forth in the conditions of Project Z-Degree, e.g. a zero textbook cost major developed at each Idaho community college.

* Adapted from College of Southern Idaho's Plan

COLLEGE OF
SOUTHERN IDAHO

OFFICE OF THE PROVOST

LEARNING RESOURCE AFFORDABILITY PLAN
3.18.2022

Introduction

The cost of textbooks has been a longstanding barrier to student access and affordability. According to the Educational Data Initiative website:

- In 2021, the average cost for full-time, undergraduate students at a four-year university for books and supplies per year was approximately $1240.00, **with students spending the most (average of $1420) at public two-year colleges** compared to $1220 per year at private four-year colleges (average of $450-$625 per semester).

- When possible, nearly **66% of students will avoid buying course materials** due to the steep prices

- In 2020, 25% of students indicated they **worked extra hours** to pay for their books and materials and 11% **skipped meals** in order to afford books and course materials

- In 2020, 19% of students indicated **the cost of materials and books directly influenced their decision on what classes to take**

Anecdotally, we are fully aware that students attending the College of Southern Idaho sometimes forego the textbook altogether and attempt to muddle through the course. First-generation students may not even be aware that they are required to purchase textbooks, let alone know the high costs and variability of textbook selection and adoption. Many students attend their first class sessions without textbooks and get off to a rocky start.

While national data indicate that through various means the total cost of textbooks has declined since 2016, it remains a significant problem. The College of Southern Idaho is committed to a mitigation if not elimination of textbook and/or learning resource costs with the end goal of becoming a "zero added textbook cost institution," where students simply secure their learning resources as a function of their course registration. This will have the effect of:

- Student relief from *additional* costs of textbooks and other learning resources so there are no *added cost* surprises; and

- Students will have access to their resources on day one of the course and be fully equipped to succeed; and

- Equitable access to any course in the schedule, rather than searching for a course with the lowest textbook cost; and

- Improved access to higher education and student success

While CSI is not subject to Idaho State Board of Education *Policy III.U. Instructional Material Access and Affordability*, which provides the universities guidance and sets expectations, the College has made the commitment to adhere as best it can to the policy in good faith, including the specific requirements set forth therein.

Current activity

In 2021 at the behest of the Office of the Provost, an ad hoc committee was formed with the express purpose of determining how best to incrementally move toward the ultimate goal of becoming Idaho's first Zero Added Textbook Cost Institution. Two employees were selected to co-chair the committee, including a member of the CSI Teaching and Learning Center (and former President of the Faculty Senate) and the Director of the CSI Bookstore. Both had been instrumental in the deployment of the *inclusive access*, also known as *automatic charge*, which is a textbook publisher subscription service for digital textbooks as a significant cost saving measure. The committee, made up largely of faculty, has met a number of times and set milestones for meeting the goal as well as quantifying the total financial cost to students.

This analysis not only creates a snapshot of current faculty commitments to keeping costs down but creates a goal or target for the total cost of the initiative. It is quite apparent that it will take multiple tactics to reach the goal, including but not limited to:

- Faculty dedication and commitment to sensitivity around textbook costs (something that is already apparent)

- Continued deployment of inclusive access/automatic charge

- Use of the CSI Library as a resource

- CSI Foundation support

- Institutional support

- Minimal course fees in lieu of textbook purchases

- Development and adoption of open educational resources (OER)

The College is currently participating in a new statewide OER initiative (Project Z-Degree) which will provide $1 million to support this effort over the next few years. However, textbook adoption and selection remains a primary role of faculty and the institution fully supports this academic freedom right.

Plan

According to policy III.U. the institutional plan is to consist of the following elements at a minimum. For each of the elements, institutional comment is provided.

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*

  o This is accomplished through institutional program review, outcomes assessment, and textbook adoption processes, along with support from and in consultation with the Student Disability Services unit and the Teaching and Learning Center. A review of current textbook adoption processes across departments and programs is planned for the Spring 2022 semester.

- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*

- o As stated earlier, the CSI faculty have made these commitments as an inherent function of their positions. However, during the process of textbook adoption and selection review, the College will undertake to create reasonable parameters around selection that are consistent with the language in the policy.

- o The College will commit to the creation of institutional textbook selection policy.

- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*

  - o Will be accomplished through the deployment of Project Z-Degree (the community college OER project) as well as through the Teaching and Learning Center, library, and other instructional support services*.*

- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*

  - o See the first and second bullets above

- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*

  - o This is a function of Project Z-Degree including significant collaboration between institutions.

- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*

  - o Course marking will be deployed as soon as possible, although it is important to point out that CSI is adopting a new Student Information System which may cause a delay.

- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*

  - o This will be a component of the plans cited above in the first two bullet points as well as those set forth in the conditions of Project Z-Degree, e.g. a zero textbook cost major developed at each Idaho community college.

COLLEGE OF WESTERN IDAHO

Access Plan for Affordable Instructional Materials

June 30, 2022

According to Idaho State Board President Kurt Liebich, "the 'Z' in Project Z-degree stands for 'zero cost' and the goal is to make it possible for students to earn an associate degree with zero or very low textbook costs." To this end, The State Board of Idaho allocated one million dollars to Idaho community colleges to create at least one Z degrees per institution by 2023. CWI is confident that it can do at least that, and we intend to build on the momentum of instructors who have already been doing a lot of work in this area.

CWI has identified three A.A. degrees to begin as Z degrees in Fall 2023. Our goal is to increase the numbers of Z degrees available to students, to make it clear which courses they take are 0 to low-cost for instructional materials, and to become known as the place students can come to for a high-quality, lower cost degree. As Z degrees become more common at CWI, the affordability for all students will increase.

Even though CWI, as a Community College, is not subject to State Board policy III.U which requires an affordable instructional materials plan, we believe in the merits of this policy and are striving along with our four-year institutions to put a successful plans in place. Along with our Z degree goals, we have commented on the material parts of policy III.U as they relate to our plans to increase access to instructional materials to all students on day one of class with little to no cost to them. Comments are provided in the sub-points below each policy item marked by roman numerals.

a. Plans shall include the following elements:
    i.   Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).
        a. As part of our materials accessibility strategy, CWI Library staff and CTL are committed to supporting all CWI faculty who employ OER and other materials in their courses to ensure instructional materials are accessible. This includes 1:1 help as well as existing training on Accessibility of instructional materials.
        b. CTL supports Ally, a tool that works in our Blackboard LMS to allow faculty to ensure that all instructional materials are accessible. CTL has training and a yearly accessibility competition to help faculty improve their instructional materials accessibility score.
        c. The Idaho Legislature's OER funding and support by Merlot ensure a renewed focus on the types of instructional materials faculty employ for

students, encouraging them to take advantage of developing course specific OER for their courses that is both accessible and relevant. Faculty are awarded stipends from this money to help ensure that their instructional materials are relevant and accessible for all students.

ii.   Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.

    a.   The Idaho Legislature's OER funding and support by Merlot ensure resource support for our OER plan through the end of the Fall 2023 academic term. OER is a key strategy for CWI, especially in the General Education courses to ensure students have first day access to instructional materials. We will ensure that there are several full pathways through the Gen Ed designated courses and multiple degrees offered at CWI using strategic funding of stipends for faculty to create OER for their courses in these areas.

    b.   CWI has created an OER committee that includes members from the Library, the Center for Teaching and Learning, Deans, Department Chairs, faculty with expertise in OER, and the OER coordinator that is overseeing the distribution of stipends for faculty engaging in OER work and training.

    c.   Already gathered lists of instructional material cost for different courses will be utilized to identify additional 'high cost' textbook courses where instructors might be encouraged to look into more affordable solutions through the role of the OER coordinator at CWI.

    d.   Work is ongoing with department chairs who use instructional materials with an 'automatic charge' such as IncludED to make sure that they are in disciplines that are appropriate (especially for support in practice in repetitive skills or problem-solving). These types of courses will be included as part of a 'Z degree' initiative for zero to very low-cost instructional materials across the whole range of required courses for degrees at CWI, but only as a last resort because these 'special fees' do raise the cost for any students paying out of pocket for their education.

iii.   Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.

    a.   The Idaho Legislature's OER funding and support by Merlot ensure that resources are available to award faculty stipends who undertake training in best practices in OER through a supported LMS site developed for this

purpose. Faculty training in topics including 'What is OER?'; 'Finding better OER'; 'Creative Commons licensing'; 'How to use Pressbooks'; and 'Accessibility and Universal Design' is currently ongoing and supported through stipends.

b. Where appropriate, department chairs can support those creating OER to showcase their work at conferences both online and in person. Department chairs will be encouraged to make this available to interested and qualified faculty.

iv.   Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.

a.   The Idaho Legislature's OER funding and support by Merlot ensure resource support for up to 40 faculty to identify, adopt and adapt OER for their courses. Strategies include this staged [stipend process](#).

b.   Planned in-service meetings starting Fall 2022 where the basics of OER are discussed and opportunities given to faculty to participate in finding and creating OER for their courses.

c.   The OER Coordinator has identified degree programs that are closest to a Z degree pathway (3 of these have been positively identified, with several others close to having a Z degree) and will continue persuading department chairs of the benefits of this for students and for their instructors.

v.   Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.

a.   The State Board of Idaho has provided access for CWI to their own instance of Pressbooks which faculty are encouraged through training in Pressbooks publishing and appropriate stipends, to make their OER available on this site. Along with the 3 titles currently available as of mid-June 2022, there are at least 2 more in production for Gen Ed common numbered courses that will be published in the next few months.

b.   Stipends are available to faculty who have significantly altered or created OER to publish their work on the CWI Pressbooks site.

c.   Discussions with all community college OER coordinators are ongoing on the best way to share the OER that are being developed at each institution as well as faculty who are involved in this process. This should encourage further collaboration as well as minimize duplication of work in any given discipline area.

vi.   Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.

a.   The CWI OER Committee is currently in discussion with the registrar on ways to use our course management system to not only indicate the sections of

courses that are 0 to very low-cost as well as the Z degrees available at CWI. We hope to have a plan in place for course marking by the Spring 2023 semester.

vii. Course marking processes at the time of course schedule releases that indicate course sections that reliably require the purchase of, including an automatic charge for, any access codes for instructional materials.

a. See above comment under vi.

viii. Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.

a. Goal 1: Utilize the State Legislature's funding to focus the stipend process to develop OER, in coordination with other Community Colleges, for as many common-numbered courses as possible by Fall 2023. A reachable goal would be 50% of common indexed courses across the 4 community colleges.

b. Goal 2: Utilize the State Legislature's funding to develop as many Z degrees as possible in coordination with other Community Colleges and Merlot who has been provided as our 3rd party solution partner. For CWI, the goal is to develop at least 4 Z degrees by Fall 2023.

c. Goal 3: By Spring 2022, to identify common indexed courses that are good candidates for OER but ones that CWI faculty have not considered, and make stipends available to dual credit instructors for these courses to develop OER and complete OER training if they are interested. Dual credit instructors will also be made aware of any OER developed for the courses they instruct to use if they wish.

b. Plans may include the following elements:

i. Course marking that indicates the cost of instructional materials in course sections at time of registration that are low cost, mid cost, and/or high cost, as defined in this policy.

a. See goal vi.a above

ii. Strategies with measurable goals for improving and using readily available and relevant OER or other affordable instructional materials in non-common-indexed courses.

a. In April 2022, calls to interested instructors of common indexed courses, and then all Gen Ed designated courses at CWI went out. After 3 weeks, this call was widened to all courses at CWI. By Fall 2022, additional common indexed courses should be identified in coordination with the other Community Colleges, and a structured call for instructors to develop OER for those courses

should be sent out. This call should, using the same process, be widened to all Gen Ed designated courses at each institution in Spring 2023.

iii. Policies or procedures that encourage faculty to be intentional in selection and use of instructional materials, including ongoing review and reconsideration of required materials.

a. At a period of 2-3 years after the original publishing of course specific OER, faculty who organized/created any published CWI Pressbook content would be asked to revisit their published OER and update as needed, with the awarding of a $500 stipend as an additional incentive for this.

b. Continuing Professional development opportunities around the use of OER will be planned for at least once/academic year by the OER coordinator around the benefits and effectiveness of using OER.

iv. Inclusion of efforts to increase access and affordability of instructional materials as part of tenure and promotion processes.

a. The OER committee will lead discussions with the promotion committee on the best way to notate and acknowledge the work done by faculty in the area of OER and resource accessibility on their yearly reviews and promotion materials.

v. Other elements as determined by the institution.

Idaho State University

Plan to Increase Access and Affordability of Instructional Materials

June 1, 2022

Idaho State University

OPEN EDUCATIONAL RESOURCES
COMMITTEE MEMBERS

Co-Chairs: Cindy Hill & Jeremy Thomas

College of Arts and Letters: Jeremy Thomas

College of Business: Iris Buder

College of Education: John Curry

College of Science and Engineering: Todd Morris

College of Technology: Mona Doan

Division of Health Sciences: Mary Van Donsel

Library: Kristin Whitman/Sandra Shropshire

Instructional Technology Resource Center: Kim Tomkinson

Faculty Senate: Dave Bagley

Academic Affairs Administration: Stefanie Shadduck

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Idaho State University   Plan to Increase Access and
Affordability of Instructional Materials

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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

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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.

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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

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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

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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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Lewis-Clark State College – OER / Low-Cost Course Materials Report
6.22.2022

Introduction

This brief report describes Lewis-Clark State College's efforts surrounding the Idaho State Board of Education's *Policy III.U Instructional Materials Access and Affordability*. At LC State, due to the makeup of our student population, we have been engaged in practices associated with access to affordable materials long before the State Board policy was instituted. Some of the common practices included (and still include):

- Using available OER materials for courses

- Design and implementation of OER has been accepted as evidence of scholarship or teaching excellence as part of annual performance review and the tenure / promotion processes

- Deliberately using older editions of textbooks that were attainable at much lower cost to students

- Using the same textbook for a sequence /series of courses (i.e. - SPAN 101, 102, 201, and 202 or BIOL 227 and 228)

- Hosting informal textbook exchange libraries in the lobbies of the Nursing and Science buildings

With the advent of policy III.U, the College has expanded its efforts, particularly focused OER / Low-cost efforts on General Education Core classes, and is now tracking OER / Low-cost implementation on an annual basis. As a consequence, our tracking data shows the following results:

- We survey annually our General Education Core offerings (from the six State Board of Education policy-defined areas/ways of knowing).

- 27.7% of our General Education Core course sections are offered with OER materials or at no cost to students

- Another 34.4% of the sections offered fall into the low-cost category (defined as costing between $10 to $50.

- See appendix (below) for complete listings and results.

Plan

LC State's plan is to fully comply with the stipulations which are outlined in policy III.U. The institutional plan is to consist of the following elements at a minimum. For each of the elements, institutional comment is provided.

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*

  o This is being accomplished through a variety of partnerships and resources. These include our campus bookstore, Library, Center for Teaching & Learning, e-Learning Services, and Accessibility Services.

- o Workshops are being provided on a regular basis hosted by the CTL and/or e-Learning services.

- o These resources are introduced to all new faculty as part of our *New Faculty Orientation* program.

- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*

  - o LC State administration and faculty have made this commitment.

  - o Textbooks and materials selections are reviewed by programs and divisions each year.

  - o The Provost's Office will work with faculty leadership to create a student-centered institutional textbook selection policy.

- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*

  - o LC State has been actively involved in funding and supporting OER implementation efforts by faculty.

    - ▪ As mentioned above, regular training and workshops are offered by e-Learning and the CTL.

    - ▪ The Dean of Liberal Arts & Sciences offered GEM-TRAC mini-grants to faculty to develop OER / Low-cost options for Gen Ed courses.

    - ▪ Participation of 3 different faculty members in the statewide OPAL Fellows program (sponsored by the OSBE).

    - ▪ Support for faculty travel and participation in OER-themed conferences.

    - ▪ Sabbatical support for faculty OER projects.

- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*

  - o See above:

    - ▪ Regular trainings.

    - ▪ GEM-TRAC mini-grants.

    - ▪ OPAL Fellowship participation.

- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*

  - o See above:

    - ▪ CTL & e-Learning support / trainings.

    - ▪ GEM-TRAC mini-grant participants included faculty from 11 separate General Education Core courses. Nearly $20,000 has been spent since 2018 on these projects which have included:

- Purchasing textbooks for HUM 150, HIST 101 & 102, and ENGL 261 and establishing a lending library in partnership with the LC State Library.

- Creating OER curriculum from scratch for COMM 204 and MUS 101.

- Creating an online course shell (using Canvas) for ENGL 101 & 102 that is accessible to all first-year composition instructors. It is outfitted with complete course templates using OER materials. Instructors also freely add in their own materials to share.

- Creating OER resources/materials for NS 150, ENGL 175

  - OPAL Fellow participation in ENGL 101, MATH 153, and ECON 201/202 over $11,000 of support funding.

- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*

  o This is something that we are currently working on with the Registrar.

  o We have built, in partnership with our campus bookstore, links to required course materials for every class that is listed in the course registration system. Students can look, prior to signing up for a class, what the required materials will be (including if no materials are required).

- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*

  o The focus of our efforts over the past three to four years has been to increase OER and low-cost option in our General Education Core areas, which specific attention paid to the common-indexed courses.

  o The latest tracking data is provided below in an appendix that shows OER and Low-cost options in relation to our entire Gen Ed Core offerings.

  o LC State's current dual-credit course model does not require high school students taking courses at their own high school to purchase additional materials. Students are either supplied the texts/materials by their high school or through cooperation of our Early College Programs office.

Appendix:

Tracking data for 2020-21 of OER and Low-Cost sections offered of all General Education courses from the six State Board of Education policy-designated ways of knowing Core areas.

Course	#Sections	# OER or No-Cost Sections	# Low ($10-$50) Cost Sections	Comments
ART 100	5	0	0	
COMM 101	4	0	4	
COMM 203	2	0	0	
COMM 204	16	3	9	
ENGL 101	26	22	4	
ENGL 102	21	9	8	
ENGL 175	8	0	2	Requires a number of classic texts
ENGL 257	2	0	1	Requires a number of classic texts
ENGL 258	3	0	2	Requires a number of classic texts
ENGL 261	1	1	0	Requires a number of classic texts
HUM 101	3	0	1	
HUM 150	2	2	0	
MUS 101	2	0	0	
MUS 102	0			
MUS 150	0			
MUS 151	0			
NP 101	1	0	1	A packet created by the professor
NP 102	1	0	1	A packet created by the professor
SPAN 101	7	0	0	Same textbook is used for SPAN 101 --
SPAN 102	3	0	0	-- SPAN 102, 201, & 202
THEA 101	6	4	0	
MATH 123	2	1	1	
MATH 130	0			
MATH 143	3	0	0	
MATH 147	1	0	0	
MATH 153	10	3	0	
MATH 170	2	0	0	
MATH 253	0			
MATH 257	1	0	0	
BIOF 100	1	0	0	

BIOL 100	0			
BIOL 120	1	0	1	
BIOL 123	0			
BIOL 175	1	0	0	
BIOL 227	6	0	0	
CHEM 100	0			
CHEM 105	11	2	4	
CHEM 111	4	2	2	
CS 108	2	0	0	
FSCI 101	0			
GEOL 101	2	0	2	
GEOL 120	0			
GIS 271	1	0	1	
NS 140	1	0	0	
NS 150	3	1	2	
NS 174	2	0	0	
PHYS 111	1	0	0	
PHYS 112	1	0	0	
PHYS 171	2	0	2	
PHYS 205	1	1	0	
PHYS 211	1	0	0	
ANTH 102	6	6	0	OER text used
ANTH 120	1	0	1	
ANTH 170	1	1	0	No cost non-OER materials assigned
GEOG 102	2	0	2	
HIST 101	3	3	0	All sections have no cost checkout from library
HIST 102	3	3	0	All sections have no cost checkout from library
HIST 111	5	0	5	Most students can purchase used texts for under $10
HIST 112	1	0	1	
POLS 101	3	0	0	2 texts required; each is under $50 but combined are about $59
POLS 237	0	0	0	No sections offered AY20-21
POLS 285	1	0	1	
PSYC 101	6	0	6	
PSYC 205	11	0	5	
SOC 101	6	0	6	Older edition used which commonly retails between $10 and $35

![North Idaho College logo]

Institutional Plan for Implementation

Idaho State Board of Education // <u>*III.U. Instructional Material Access and Affordability*</u>

OVERVIEW + PROGRESS

When the <u>*Project Z-Degree*</u> initiative was announced by the Idaho State Board of Education in June of 2021, the *Assistant Dean of Instruction*, Gail Ballard, convened a small sub-group of staff from the library and eLearning in FA21 to discuss support and next steps at North Idaho College (NIC). This group consisted of the *Director of eLearning*, Thomas Scott, and *Public Services/Collection Development Librarian*, Brian Seguin as well as other faculty who had or were shifting course materials to lower cost options. The initiative overlapped with a significant leadership change at the college. However, the work that Gail invested in building a foundation for this project's success at NIC cannot be overstated. During this transitional period, she networked and identified interested parties in the faculty body, collected information about current OER use that, combined, ultimately led to the suggestion of two associate Z-Degree pathways for the college.

In April of 2022, Brian Seguin, was identified by the Provost and Dean of Instruction as the institutional/project lead for the Z-Degree initiative. Externally, he is meeting every other week with the MERLOT team to pose questions in support of implementation. Similarly, he attends the SBOE's Open Education Office Hours Zoom meetings hosted by Jonathan Lashley. This group is comprised of participants from other higher education institutions in the state. The group includes colleagues from the College's eLearning department and Office of Instruction.

Internally, the Project Lead has met separately with the Provost and Dean of General Studies to confirm support of the funding model proposed by CWI which was officially adopted in May of 2022.

Since April of 2022, the following has been accomplished:

- *Project Lead identified (Brian Seguin).*

- *'Project Z Degree' briefly introduced during the May Faculty Assembly meeting and petitioned those with interest in converting to OER options to contact the Project Lead directly. 'Project Z' will be discussed again at either the August or September 2022 meeting.*

- *Project Lead met with key stakeholders in April and May to discuss vision, scope, and barriers.*

- *Project Lead created <u>a survey</u> to solicit interst from colleagues in joining an OER Workgroup. Lead will coordinate meetings in late May 2022.*

- *Project Lead has met with the Natural Sciences Division Chair to discuss the adoption and development of materials to support all BIOL 100 courses at NIC.*

PLAN FOR IMPLEMENTATION

As outlined by policy *III.U.* the College's plan for implementation is as follows:

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*

  ➢ This will be accomplished through coordination with *Disability Support Services* and the Accountant of *Auxiliary Services*. Currently, the college's contract with the bookstore service provider, Follett was renewed through 2022-23 but it is unclear who the provider will be for 2023 and beyond.

- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*

  ➢ The College does not have a textbook selection policy and respects faculty's freedom to choose course materials that best supports learning in the classroom. The Project Lead and OER Workgroup will work to provide introductions to OER and other learning opportunities through workshops and resources (OER research guide) to make faculty aware of the availability and benefits of adopting low-cost materials.

- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*

  ➢ PD opportunities will be available through the MERLOT group and state funding for *Project Z-Degree*. Additionally, as mentioned above, workshops will be developed and made through collaboration between the library, eLearning, and the *Teaching and Learning Center* (TLC).

- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*

  ➢ In addition to workshops focusing on introducing and adopting OER, the Project Lead hopes to identify early-adopter faculty to participate in conversations about implementation to help promote the benefits to colleagues and share information to improve efficiency when adopting/adapting/developing.

- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*

  ➢ The *Project Z-Degree* funding model that was adopted points to scalable funding for implementation. Additionally, the College has discussed honoring achievements at the end of the academic years through an award. This will be discussed further.

- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*

  ➢ Course marking will be discussed and coordinated with the College's Registrar and I.T. department. Target rollout date is SP22.

- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*

  ➢ The initial review and assessment of material to be implemented will be done by the Project Lead. Future evaluations with regard to currency/relevance will be defined.

CONCLUSION

The evidence outlining the impacts of OER and low-to-no-cost course materials continues to grow. The positive impact on student retention and reducing the financial insecurities that many community college student populations experience is clear. Anecdotally, NIC library staff have noted the demand for course reserve materials is greatest in the first five weeks of a semester when required textbooks are often backordered or unavailable. At the least, offering low-to-no-cost materials through this period of time could have a significant impact on retention rates.

The Project Lead will continue to document and assess progress, collaborations, and adoption of OER at NIC and will suggest changes or pivots as necessary. NIC is eager to support *Project Z* and will be working towards offering Associates Degrees in *General Studies* and *Education*.

University of Idaho Institution Plan for Instructional Material Access and Affordability

The University of Idaho vision is to "expand the institution's intellectual and economic impact and make higher education relevant and accessible to qualified students of all backgrounds". To help realize this vision two key objectives in our 2016-2025 Strategic Action Plan are to:

1. Provide greater access to educational opportunities to meet the evolving needs of society.
2. Create an inclusive learning environment that encourages students to take an active role in their student experience.

This plan for instructional material access and affordability is designed to contribute to the accomplishment of these objectives. In addition, the plan fulfills the Idaho State Board of Education's requirement that each institution develop and implement a plan to increase access and affordability of instructional materials for all students (Governing Policies and Procedures, Section III.U.).

Units that play central roles in the implementation of this plan include, among others:

- Center for Center for Disability Access and Resources (CDAR, Amy Taylor, Director and Eric Matson, Assistive Technology Specialist)
- Center for Excellence in Teaching and Learning (CETL, Brian Smentkowski, Director)
- Information Technology Services (ITS, Dan Ewart, Chief Technology Officer)
- Office of the Provost & Executive Vice President (Torrey Lawrence, Provost & Executive Vice President)
- Office the Registrar (Steven Stubbs Assistant Registrar)
- University of Idaho Library (Marco Seiferle-Valencia, Open Education Librarian)
- University Teaching Committee (UTC)

i. Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students.

   a. University of Idaho Library (See: Appendix A)
   - The Library is a skilled and practiced partner in securing print and digital copies of course materials and has significant experience providing instructional materials across all modes of delivery. The Library is working with the Center for Disability Access and Resources, the unit on campus which coordinates and administers learning accommodations, to explore additional options for streamlining and integrating the process of making accessible course materials more widely available.
   - In 2021, the Library received a $75,000 ARPA Grant to fund a pilot program to provide temporary internet access in the form of loanable wi-fi hotspots as well as provide high quality laptops. In addition to this program, the Library offers Chromebooks through the Gary Strong Curriculum Center in the College of Education. These programs will need sustained funding to continue indefinitely.

- Leganto: The Library's integrated course reserves platform that helps make course materials more accessible to students. Embedded directly into each Canvas course and connected to the library's resources, Leganto allows instructors to easily create and customize reading lists, so that students can access all their course materials in one place. Source
    a. Leganto workshop video,
    b. Curating a reading list guide, or
    c. Contact libreserve@uidaho.edu for personalized help
    d. Leganto FAQs

b. Center for Disability Access and Resources (CDAR)
  - CDAR created (and will maintain) a checklist to assist faculty with the task of building accessibility into a course. The objective is to increase the number of courses that start each term with course content and processes that meet published standards for accessibility, outlined in the Web Content Accessibility Guidelines (WCAG) 2.0. While the focus of the guidelines is web content, the industry applies these standards to all digital content. CDAR's checklist is an easy to read, short checklist of common accessibility-related areas that should be designed into each course. By building in content and processes that meet the standards we can develop a culture of proactively designing courses with accessibility in mind, rather than a more reactive approach to making adjustments to courses after a term has begun. Key areas included on the checklist are such things as PDF's with searchable text, word documents with headers, images with alt text, videos captioned or with auto transcriptions enabled, hyperlinks properly labeled, font style & size, color contrast, and organization/layout.
  - There are many resources available with respect to digital content. In addition to the checklist CDAR is working with CETL to create additional targeted guides for each item on the checklist that draw upon these resources.
  - CDAR and CETL routinely offer workshops for faculty on making courses more accessible. For example, "From Our Perspective, a Student Panel on Creating Accessible, Inclusive Classes", March 31, 2022.
  - When a textbook is required for a course and that textbook has been ordered from the bookstore, CDAR will know of the requirement prior to the start if the semester. The same is not yet true of instructional material that is not distributed through the bookstore (e.g., OER, journal articles). The plan is to add an "instructional material type" attribute to the Course Leaf Section Scheduler (CLSS) that would prompt CDAR to be aware that a course will include non-textbook materials. CDAR benefits from knowing, prior to the beginning of a semester, the type of instructional material (e.g., textbook, journal articles), if not the specifics of such material (e.g., specific articles) that is planned for each course. Knowing the types of instructional materials gives CDAR a heads up on what to anticipate.

c. Awareness building about available resources and support
  - A critical step for developing a culture that is mindful of accessibility standards and practices is increasing awareness of the benefits of meeting the standards and an

awareness of available resources. The key units mentioned at the beginning of this plan will implement ongoing, coordinated messaging with respect to accessibility-related goals and practices to faculty, staff, students, and other stakeholders across digital and traditional channels.

ii.   Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education.

a. Library
- The Library provides strategies in the form of specific content recommendations, such as identifying suitable Open texts per instructor request and support for innovative instructional design via the development of unique digital web spaces. The Library's expansion to a more integrated course reserves system (Leganto) allows faculty using the system to have total control of designing their course material reading lists while providing a zero-cost course to students. The Library has prioritized strategies that allow for faculty to retain total academic freedom and discretion, versus pushing a particular vision or ideology of Open.

b. Center for Excellence in Teaching and Learning
- In collaboration with the University Teaching Committee and ITS, CETL will administer a bi-yearly (i.e., Sept/Feb) survey of faculty about technology use by course and section. Results of the survey will be shared bi-yearly (i.e., Nov/April) prior to the time when instructional-materials decisions are made for the upcoming term. Collecting and then sharing information about technology tools in each course and section will help units and faculty see areas for collaboration or common use of technology across courses. For example, if an individual faculty member sees that other courses in their unit are using Tableau (i.e., a visual software) they may choose to use Tableau in their course rather than an alternative visualization software.
- A draft of the questionnaire is included in Appendix C.

iii. Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.

a. Library
- Professional development opportunities created by the Library include workshops and programming on both OER and Open, and more recently on using Leganto and Course Reserves, as well as more intensive opportunities like the Think Open Fellowship Program. The Library is allocating additional library faculty time to dedicated Open programming to expand our outreach, partnership, and workshop offerings.

b. Awareness building about professional develop opportunities, resources, and support
- Increase awareness of OER-related development opportunities through integrated communication efforts. The key units mentioned at the beginning of this plan will implement ongoing, coordinated messaging with respect to OER-related resources and practices to faculty and staff across digital and traditional channels.

- Communicate opportunities for learning more about OER and collaborating with others working to incorporate more OER materials at their institutions. Opportunities such as: Open Education Week and Idaho Open Education Week Symposium.

iv. Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.

a. Library
- Our primary strategy to support faculty use of affordable instructional materials has centered around our two main programs that support this goal: Think Open Fellowships and Leganto course reserves. Think Open Fellowships support more intensive materials development as needed and result in a zero-cost course materials list with supporting syllabus. Leganto course reserves helps transition an established student cost savings system, physical reserves and e-reserves, into a more integrated and usable system that blends with the LMS. Leganto course reserves is highly scalable and doesn't demand that faculty necessarily switch to an open text, as licensed materials can be made digitally available to students.
- Develop a guideline to educate faculty, staff, and students to be aware of how we can use and share OERs and materials from other library sources. Sometimes, it is hard to know if we can share an article with the students as we do not know if this violates the copyright policy.

b. Awareness building about available OER-related strategies
- Increase awareness of strategies for OER adoption, adaption, and use through integrated communication efforts. The key units mentioned at the beginning of this plan will implement ongoing, coordinated messaging with respect to OER-related resources and practices to faculty and staff across digital and traditional channels.

v. Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.

a. Library
- This is an area under development at the Library. Currently some materials created by Think Open Fellows are hosted on the OER sharing platform OERCommons, where we have a Library Group Space. The Library is also building out the University of Idaho PressBooks space mentioned elsewhere in the plan.
- Think Open Fellowship Program: Fellowships allow faculty and graduate students to identify and create openly licensed materials that increase quality representation and inclusion of people from marginalized identities. Source

b. CETL
- The plan is to add a "willing to share?" attribute in the questionnaire (Appendix C) of the bi-yearly technology-use survey to ask faculty if they have OER that they would be willing/able to share. Affirmative responses will be included in subsequent report to faculty.

vi. Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost.

a. Registrar's Office
- A "cost" attribute will be added to Course Leaf Section Scheduler (CLSS), and a description of the cost categories will be added to the CLSS user's guide (i.e., "Zero cost" means a total list price of $0, "Very low cost" means a total list price of $1-$30, "Low cost" means a total list price of $31-$50, "Mid cost" means a total list price of $51-$100, "High cost" means a total list price of more than $100 .
- Data entry will be the responsibility of the unit administrator.
- Cost designation for each course will be displayed on the semester schedule (FSH 4610). One decision that is still to be made, is the prominence of the cost information, relative to other information about each course that students need/want in order to make decisions.

vii. Course marking processes at the time of course schedule releases that indicate course sections that reliably require the purchase of, including an automatic charge for, any access codes for instructional materials.

a. Registrar's Office
- The process will be the same as the one mentioned in the previous section.
- Data entry will be performed by the unit administrator.
- Designation of any requirements (e.g., purchase an access code) will be displayed on the semester schedule (FSH 4610). As with the cost designation, a decision that is still to be made is the prominence of the information, relative to other information about each course that students need/want in order to make decisions.

viii. Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common indexed courses, including dual credit courses.

a. Library
- In the Library's Think Open Fellowships selection criteria, high enrollment common indexed courses are specifically named as projects that are prioritize. Other elements the Library prioritizes include a project's need for sustained support or collaboration with the Library's resources and expertise, as well as projects that represent unique or new contributions to the Open literature or landscape for that discipline

ix. Annual Report – plan for yearly review and report to the Board on the implementation and outcomes of the plan.

a. The format and requirements of this annual report shall be determined by the Executive Director or designee.

Appendix A

Open at the University of Idaho Library

The University of Idaho Library engages Open, Open Educational Resources (OER), and overall student course materials affordability through a combination of direct programming, core library services that reduce student costs, and overall expertise and capacity building. While the Library has always prioritized student affordability as part of our core mission, we formalized this commitment in 2021 by officially recognizing student access and affordability as a key strategic goal for the Library. This commitment is a logical next step of the missions explored by programs like Think Open Fellowships and the Open Access Fund, created in 2017 and 2018, respectively, and recognizes the Library's overall commitment to leading with Open and affordable materials.

Direct Programs

The Library created these programs specifically to engage Open practices on campus. These programs were created and are run by the Library with the direct goal of supporting and increasing Open Access publishing and Open Pedagogy in University of Idaho classes.

Think Open Fellowships:

Think Open Fellowships are one to two semester long fellowships awarded through the Library that support the often intensive work required to transition a course to open or no-cost course materials. This program was started in 2017 and awards 6 fellowships a year with a $1,200 stipend. Think Open Fellows partner with the Open Education Librarian, as well as other faculty librarians, to identify and implement new materials. **To date this program is estimated to have saved students over $500,000 in course materials costs and directly impacted at least 6,000 University of Idaho students.**

Think Open Fellowships demonstrate the wide range of activities that might fall under Open Pedagogy. Some examples include:

- Creation of original digital textbooks such as:
  - ***Integrated Musicianship: Aural Skills*** – *by Miranda Wilson*
    - An Open-Source, interactive, online textbook for college-level music courses.
  - ***Inquiry-Based Music Theory*** by Sean Butterfield and Evan Williamson
    - An Open-Source, interactive, online textbook for college-level music theory courses written and designed by Sean Butterfield and Evan Williamson.
- Adoption of existing Open textbooks such as:
  - A Physics OpenStax Think Open Fellowship project developed by PhD student Russ Miller: learn more **here.**

- Creation of OER for K-12 classrooms and College of Education undergraduate courses such as:
  - Rebekka Boysen-Taylor's **Teaching Anna Murray Douglass** lesson plans
  - Janine Darragh's trauma-informed ESL **lesson plans**, created for use in Nicaragua and Syria and shared in 2021 with students at Central American University, Managua, Nicaragua.

Open Access Publishing Fund:

The Open Access Publishing Fund (OAPF) provides at least $30,000 per year to researchers at U of I to publish in Open Access journals. **Over the last three years, the OAPF has funded over $145, 000, resulting in publication of 99 fully Open Access journal articles, supporting over 170 authors and researchers across six colleges.**

This annual fund is administered and directed by the Library and funded by the Library, the Provost's Office, and the Office for Research and Economic Development. While Open Access journals by definition provide their journal contents free of charge, these journals frequently pass the publishing costs along to authors through article processing charges (APC). The OAPF awards grants of up to $2,000 to cover these costs, on a first come first serve basis, with the main requirement being that the intended journal be officially listed in the Directory of Open Access Journals. This is a popular program that frequently dispenses all funds to researchers and scholars within a few weeks of opening.

Supporting Open Access models of publication demonstrates that U of I embraces equity of access, which is a catalyst for increased impact and visibility throughout the state, nation, and beyond.

Pressbooks Open Repository:

Pressbooks is an Open textbook publishing system/platform. The University of Idaho has an instance in-development, which is currently overseen by the Open Education Librarian and the Vice Provost for Academic Initiatives. This repository is still under development, but is paid for by the state and is intended as a space to hold Open texts created at the University of Idaho. The University of Idaho instance can be found here.

For an example of what other institutions in the state are doing check out:

Boise State University

Idaho State University

Idaho Open Publishing

Faculty can use our UI Pressbooks platform to easily remix any existing Open text created on the Pressbooks platform and contact the Library for support developing, remixing, or using content in Pressbooks.

Indirect Programs

These programs support the overall goal of lowering students course materials costs but through a different mechanism than using an Open text. These options allow for restricted materials to be accessed free of cost, with certain requirements on the conditions of access such as number of users, formats, and locations.

Leganto/Course Reserves:

In 2021 the Library launched a new course reserves system, Leganto, which features enhanced options for integrating course reading lists directly into BBLearn or Canvas. This new system allows for instructors to opt into having a library reading resource list, where they can easily add new content. Once items are selected, the list is submitted to Library personnel who can then secure appropriate permissions including connecting with Liaisons for potential purchasing of e-licenses. Students get the benefit of having one central location for a course's materials - materials on the web appear right alongside Library access articles and eBooks. Professors can also design a course that uses partially open materials as well as licensed materials in a Leganto reading list, all appearing to the student in one easy to access course materials list embedded in the classes Canvas installation. **We estimate that on average course reserves saves University of Idaho students $385,000 a year.**

Student Driven Course Reserves:

Unlike traditional course reserves which are directed by teaching faculty, Student Driven Course Reserves allow students to request a particular text be purchased by the Library and placed on course reserves. This allows for students to put supplemental materials on reserve, reducing their textbook costs.

Controlled Digital Lending:

Controlled Digital Lending (CDL) allows for previously inaccessible texts to be made available in digital format, provided that specific requirements are met. At a minimum, to be eligible for CDL, an item must not have an e-license readily available for institutional purchase. Once an item is digitized, it can only be offered with particular restrictions (usually a limited number of digital seats to access to the item as well as possible time and location restrictions). Most items will not be eligible for CDL because they will have an e-license available, but this can be a viable option for select texts. This is a new program launched in 2021.

Liaisons as Open partners:

The Library liaisons program pairs each college with its own library faculty member, who provides disciplinary expertise as a subject librarian. As part of identifying student access

and affordability as a key strategic goal for the Library, Library liaisons are skilling up in Open Educational Resources and Open Access publishing in their disciplines. Library liaisons are well-situated to individually partner with course instructors to integrate Open textbooks or other Open Educational Resources into their classes.

Open/OER Resolution

On August 23rd, 2018 the faculty of the University of Idaho Library voted to adopt the following resolution:

OPEN ACCESS RESOLUTION

The University of Idaho Library faculty believes that open access to scholarship positively supports the communication of library research and scholarship and the future of libraries and education. We aim to reduce barriers to access to enable our local, state, and professional communities to engage with our scholarship. Recognizing that academic scholarship depends upon the ability to access and utilize research output, the Library Faculty at the University of Idaho hereby resolve to make our own research freely available when possible by seeking publishers that have either adopted open access policies, publish contents online without restriction, and/or allow authors to self-archive their publications on the web. We resolve to link to and/or self-archive our publications to make them freely accessible, negotiating with publishers when necessary to achieve this. We recognize that open access and peer-review are independent concepts and regard an adherence to high quality, peer-reviewed scholarship as essential for University of Idaho Library faculty, regardless of the nature of access. The University of Idaho Library Open Access Resolution is inspired by language from the Virginia Commonwealth University Library Open Access Resolution.

Appendix B

University of Idaho
Center for Disability
Access and Resources

Canvas Course Design Accessibility Checklist

→ Use this checklist as a guide for accessibility while you are designing your course.

✓	Navigation and Organization
☐	Navigational links and labels are clear and consistent.
☐	Module content has a logical order and organization.
☐	Content created in the Rich Content Editor is structured with headings using the Paragraph dropdown toolbar. Canvas Headings
☐	Headings are descriptive and used in order.

✓	Text and Links
☐	Written content is created with the Rich Content Editor in Canvas (unless in an accessible file download).
☐	Link text is descriptive, consistent, and clearly distinguishable from other text.
☐	All links are tested and valid.
☐	Colors on text and background are high contrast.

✓	Text and Links
☐	Equations, formulas, and scientific notation were created using the Rich Content Editor and/or are available in another accessible format.
☐	Lists contain related, ordered content and are formatted with bullet points or numbers using the Rich Content Editor.

✓	Tables –
☐	Tables are inserted using the Rich Content Editor tool. **Creating Accessible Tables in Canvas**
☐	Tables clearly show relationships between items.
☐	Headings in tables appear in a single row.

✓	Images
☐	Color on images is high contrast when possible. WebAIM Contrast Checker
☐	Images, including pictures, graphs, diagrams, and charts, have alt-text that includes a complete image description. Harvard Guide to Writing Alt Text ❖ The "Decorative Text" checkbox can be checked for decorative images (the alt-text field can be left blank.)
☐	The alt-text for images with text contains the equivalent text.

✓	**Video**
☐	Videos have captions and transcripts.
☐	Captions and transcripts have been reviewed for accuracy.
☐	Visual-only content in videos has accompanying audio descriptions.

✓	**Audio**
☐	Audio files (podcasts, recordings, etc.) have transcripts.
☐	Transcripts have been reviewed for accuracy.

✓	**Files**
☐	PDFs are converted to OCR and all PDF text is selectable/machine readable. Creating Accessible Documents
☐	Microsoft Office documents (Word, PowerPoint, etc.) are created using the most recent version of the program.
☐	Excel documents contain no empty cells and are used strictly for organizing data (no images or long blocks of text.)

✓	**Assessments**
☐	Extend time on Quizzes using the "Moderate this Quiz" tool to accommodate students as needed. Extending Time in Canvas Quizzes
☐	Extend due dates on Assignments to accommodate students as needed.

✓	**Other**
☐	Assignments and activities using a 3rd party tool have been made accessible and/or I have an alternative plan if the content is not accessible.

✓	**Quality Assurance**
☐	I ran the Accessibility Checker for all Rich Content Editor content in my course.
☐	I ran the Canvas A11Y tool in my course.
☐	I ran the accessibility checker for document files (Word, PowerPoint, etc.) in the corresponding program.
☐	I made the suggested changes to my course.

Appendix C

Faculty Technology Tools Survey

Survey Instructions and Content

Title	Faculty Technology Tools Survey
Audience	All TAs, instructors and teaching faculty
Planned Frequency	Twice annually, April and October, beginning in April 2022
Purpose	The purpose of this survey is to identify technology tools in use by teaching TA's, instructors and faculty that are not centrally supported by the Office of Information Technology (OIT, formerly ITS and department IT professionals).
Scale	Some questions will be multiple choice and open data entry.

Key Data Elements

- [Per ITC] Survey will be person specific so we will automatically capture name, college and department information for analysis.
- Names of tools
- Costs of tools that are paid by departments or passed on to students
- Survey should be specific to a person so that we can gather the above information and determine overall response rate

Survey Introduction

The University Teaching Committee (UTC) and the Office of Information Technology greatly appreciates you taking the 5-10 minutes necessary to complete this survey that will help identify technology tools used in support of teaching that are not centrally support by the university. Survey results will be used to identify gaps in current offerings and possibilities for central support of needed tools. If you have questions concerning this survey please email <<<name and contact info>>>.

Planned Outcomes

1. Compilation of all software in use at U of I that supports course delivery, by category, documented on a website for review by all instructors
2. Improved understanding of additional costs to students

3. Identification of categories or specific software/tools used in a critical mass for which an institutional license should be pursued
4. Identification of potential risks in information security or compliance
5. Identification of gaps in standard software

Survey

Page 0

[Text] The university offers many standard tools for course delivery and student interaction (Microsoft suite of products, Zoom, Canvas LMS, Camtasia and others). We are asking you to identify products (software applications, websites, mobile apps) you use that are not part of the standard tools where you or a student have to create a login, pay a fee or where student interactions with the course are tracked. Websites (like YouTube) that do not require a login or into which students do not enter information need not be listed.

Page 1

[Multiple Choice – Multiple Answer Question] Please select from the list below any category of technology resource in which you use a product to aid in delivering your course(s):

Select	Category
	Bibliography, Citation, and Reference Software
	Classroom/course response (Example: Poll Everywhere, replacements for in-class clickers)
	Collaboration tools (Examples: Slack, threaded discussions, video meetings)
	Data analysis or visualization (Example: SAS or Tableau)
	Discipline-specific software/tools
	Document storage (Example: Box, DropBox, Google Drive, etc.)
	Grading or gradebook software
	Learning Management System (other than Canvas)
	Lecture capture (Panapto, etc.)
	Online course content/resource repositories and online publisher materials (Pearson online books)
	Plagiarism prevention software
	Quizzing or testing
	Other

Page 2 and Beyond

[Display Logic – for each category selected on page 1, the following question will appear] In the category of <<category name>>, please list the software/tools used as part of course delivery that is not a standard university-provided tool. Please add as many lines as necessary.

Name [Required]	Type [Required] • Web software • Downloaded software • Mobile app	Is there a cost to the student? [Required] • Yes • No	Is there a cost to faculty/department [Required] • Yes • No
		[If yes - capture cost and cost frequency]]	[If yes – capture cost and cost frequency]
[Instructors can add as many lines as necessary]			

[Multiple Line Text Input Field – Suggestion from ITC] If you have any additional comments on this topic that you think would be valuable for the university to consider, please include them here.

Closing Page

[Text] Thank you for completing this important survey. If you have any questions, please contact <<<name and contact info>>>.