TAB	DESCRIPTION	ACTION
A	**IRSA - OPEN EDUCATION IN IDAHO**	Information Item
B	**PPGA - STRATEGIC PLAN AND PERFORMANCE MEASURES REVISION RECOMMENDATION**	Information Item

SUBJECT

Work Session: Open Education in Idaho

REFERENCE

April 2021	The Board approved the first reading of proposed amendments to Board Policy III.U., Instructional Material Access and Affordability. Amendments outlined general and institution-specific expectations for how Idaho colleges and universities manage the cost and availability of required textbooks and other course materials.
June 2021	The Board approved the second reading of proposed amendments to Board Policy III.U., Instructional Material Access and Affordability.
December 2022	The Board received a report on institutional and statewide initiatives related to open education in support of the implementation of Board Policy III.U.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.U.

BACKGROUND/DISCUSSION

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.

Board policy positions institutional support and recognition of Open Educational Resources (OER) as a key element of institutions' instructional materials access and affordability plans. Policy III.U. defines several required elements that must be included in institutional plans for course materials and identifies several optional elements that institutions may consider including. The policy also requires institutions to submit their plans to the Board office and provide annual reports related to implementation and outcomes.

The four-year institutions submitted initial plans in summer 2022 and reported on progress toward implementation in June 2023. While not required to develop or submit plans under policy III.U., the community colleges electively adopted these requirements in response to the $1M in funding provided by the Legislature in FY2022 to support Project Z Degree. With this funding, the colleges have developed pathways that allow students to complete an associate degree while paying zero or very low instructional material cost.

Over the past three years, the Board office has conducted a statewide survey of faculty to better understand their course-level efforts to increase access and affordability via instructional material choices. Survey questions also assess

faculty awareness, practices, and perceptions related to OER. Only faculty who taught courses with reliably no or very low instructional material costs were asked to complete the survey.

In 2024, the community colleges are requesting $400K in ongoing funding from the Legislature to continue and expand the Project Z Degree initiative. The Board office is requesting an additional $100K in ongoing funding to support open education initiatives across all institutions. These requests are aimed at further supporting institutional and statewide efforts related to OER and instructional materials access and affordability,

IMPACT
The new requirements in Board Policy III.U led all eight institutions to establish clear strategic plans for increasing access to and affordability of instructional materials. Reports indicate how each institution has faithfully implemented policy III.U. and how changes in process and practice have yielded positive results for students.

The community colleges have submitted their initial reports on the impact of Project Z Degree implementation. Collectively, the colleges have developed 11 degree pathways, comprised of 290 courses. Across these courses, 5,779 students have saved a conservatively estimated $664,284 over the past year. The colleges estimate an additional $325,000 in savings in Spring 2024 semester alone. These savings will continue and likely increase from semester to semester, representing a significant return on investment of public funds.

The OER Faculty Survey results show that faculty awareness of OER continues to grow, that an increasing number of faculty have adopted OER, and that the purpose and promise of OER-related practices are regarded as useful for sustainably accommodating student financial needs.

ATTACHMENTS
Attachment 1 – Open Education in Idaho Presentation
Attachment 2 – 2023 Reports on Institutional Plans to Increase Instructional Materials Access and Affordability

STAFF COMMENTS AND RECOMMENDATIONS
Board staff intend to present an update on open education efforts in Idaho higher education to the Senate Education and House Education Committees during the upcoming legislative session.

The purpose of this work session is threefold:
1. Update the Board on progress related to open education in Idaho, in connection with the Board's goal of increasing access and affordability of higher education for all Idahoans.

2. Apprise the Board of funding requests related to open education going to the Legislature in the upcoming session.
3. Request input from Board members regarding the nature and scope of Board staff presentations of outcomes to the Legislature.

BOARD ACTION

This item is for informational purposes.

Open Education in Idaho

December 13, 2023

Purposes of this Work Session

⇨ Update the Board on progress related to Open Education in Idaho

⇨ Apprise the Board of funding requests related to open education going to the Legislature

⇨ Request input from the Board on staff presentations about open education to the Legislature and metrics for future reporting

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1.

Board Policy III.U.

Instructional Materials Access and Affordability

Instructional Materials Access and Affordability 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 in OER

  → Course marking processes for some courses

  → Strategies for using OER in common-indexed courses (gen-ed)

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Instructional Materials Access and Affordability Plans

⇨ Optional Elements

   → Course marking process for all courses

   → Strategies for using OER in beyond gen-ed

   → Institutional policies that encourage faculty to be intentional in material selection

   → Inclusion of access and affordability efforts in Tenure & Promotion processes

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Instructional Materials Access and Affordability Plans

⇨ Highlights from 2023 Reports

→ Development of systematic course-marking plans

→ Establishment of institution-wide committees to steer plans

→ Building of ZC and VLC pathways (Project Z Degree)

→ Significant increases in faculty support

→ Implementation of new institution-level policies

→ Data collection

→ Creation of OER libraries

→ Identification of high ROI courses

→ Myth-busting efforts related to open education and pedagogy

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2.

Project Z-Degree
Implementation Update and Outlook

Project Z Degree Results

⇨ Total investment……………………**$330K (of $1M)**

⇨ Z Degree Pathways developed… **11**

⇨ Number of courses impacted…... **290**

⇨ Number of students impacted…. **5,779**

⇨ Total savings in year one……….. **$664K**

⇨ Spring '24 projected savings……**$325K**

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3.
Annual Faculty Survey
2021–2023 Findings

Year-Over-Year

	'21	'22	'23
⇨ Faculty responses	445	334	499
⇨ Assigned online materials	92%	77%	80%
⇨ Assigned OER	38%	33%	37%
⇨ Have explored OER/P*	77%	57%	64%
⇨ Could pursue OER/P*	81%	62%	72%
⇨ Estimated students taught	~20k	~25k	~98k

*Open educational resources/practices

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4.
OER-Related Funding Requests
Community College and OSBE Budgets

Funding Requests for OER

⇨ Community Colleges - $400K

➔ Ongoing support for Project Z Degree

⇨ OSBE - $100K

➔ Strategic support for III.U implementation

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4.
Legislative Presentations
Input from the Board

Legislative Presentations on OER

⇨ What messages about access, affordability and open education efforts would the Board like staff to present to the education committees of the Legislature?

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Boise State University: Affordable Learning Initiative Action Plan
Academic Year 2023 - 2024

AFFORDABLE LEARNING MATERIALS COMMITTEE MEMBERS

- Amy Vecchione, co-chair (Assistant Director of Research and Innovation, eCampus Center)
- Daniel Sanford, co-chair (Director, Center for Teaching & Learning)
- Leslie Madsen (Associate Director, Center for Teaching & Learning)
- Mandy Nelson (Registrar, Office of the Registrar)
- Michelle Armstrong (Associate Dean, Albertsons Library)
- Michal Jarolimek (Associate Director, Bronco Shop)
- Kalista Barkley (Student)
- Melanie Figueroa Zavala (Student)
- Sarah Smith (Student)

EXECUTIVE SUMMARY

The Idaho State Board of Education policy on affordable learning materials was revised in 2021. The State Board of Education Policy III. U, Instructional Material Access and Affordability requires postsecondary institutions to develop an affordable learning plan, and make progress toward achieving the plan's goals in support of access and affordability of learning materials.

Boise State University developed a plan in response to this new policy. The Boise State plan attempts to meet these 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. What follows below is contextual information and a multi-year Affordable Learning Initiative Action Plan for Boise State University.

INSTITUTIONAL PROCESS

In response to this policy, Boise State University convened individuals from units responsible for supporting affordable learning and Open Education Resources (OER) at Boise State. The Affordable Learning Committee is composed of representatives from Albertsons Library, The Bronco Shop (the Boise State Bookstore), the Center for Teaching and Learning, eCampus Center, the Office of the Registrar, and student representatives. This committee meets 1-2 times each month to discuss action items from this plan and to contribute to the action items.

The Faculty Affairs Coordinating Council (FACC) sends a survey through the Office of the Provost and Institutional Effectiveness annually in fall. This survey is distributed to all faculty and captures the numbers of faculty adopting, using, modifying, and creating OER in their courses. The Bronco Shop

collects data from instructors regarding materials costs. The data collected will inform course marking and training needs.

This plan includes all of the required elements of the Policy (specified by III U 2 a). Below you will find eight action items with sub tasks, departments responsible, and deadline. Please also note there is an addenda attachment correlating the Idaho State Board Policy III U sections to the plan and vice versa.

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ACTION ITEMS

</div>

Action Item 1: Appoint Affordable Learning Committee
A steering committee and a charter has been formed. In addition, a larger group of individuals has formed to offer feedback and complete work. This group will be reappointed annually.

- ❖ **Complete by:** Completed
- ❖ **Who's responsible or accountable?** Committee members

Action Item 2: Collect Data
Utilizing the Faculty Affairs Coordinating Council survey administered via the Provost's office and Institutional Effectiveness, capture data about who is using OER in their work, creating OER in their courses, and listing OER as a textbook for each course. Direct instructors and departments to add information to the Bronco Shop textbook adoption forms. Collect information about practices by the department about textbook materials.

- ❖ **Complete by:** each Fall semester (FACC), every semester (confirmation form & Bronco Shop)
- ❖ **Who's responsible or accountable?** Institutional Effectiveness, eCampus Center, Committee members, Bronco Shop, Provost's Office

Action Item 3: Develop systematic course marking plan
There are two parts to this action item still to do and one completed.

- Pilot course marking by adding a designation to the identified group of classes and programs that intentionally use zero cost and very low cost materials in program and course design. Document and improve the course making process including making it visible for students.
  - ❖ **Complete by:** July 2023, then semesterly
  - ❖ **Who's responsible or accountable?** Committee members, Registrar, Bronco Shop, Faculty, Faculty Senate, Student representatives
- Identify and evaluate courses that use zero cost or very low cost materials in their courses. The committee will evaluate and validate the list.
  - ❖ **Complete by:** Ongoing
  - ❖ **Who's responsible or accountable?** Bronco Shop, Registrar, Faculty
- Ensure automatic charges are course marked and visible in schedule of classes including labs, materials, live proctoring, and inclusive access fees
  - ❖ **Complete by:** Completed
  - ❖ **Who's responsible or accountable?** Committee members

Action Item 4: Policy Updates
There are several policy updates that need to be drafted.
- Create, then pilot, OER peer review processes and update appropriate faculty policies to support faculty adoption of open pedagogy practices.
  - ❖ **Complete by:** draft by May 2024
  - ❖ **Who's responsible or accountable?** Committee members
- Accessibility policy in revision process by University IT Accessibility Committee
  - ❖ **Complete by:** draft by December 2024
  - ❖ **Who's responsible or accountable?** Committee members
- Create and make suggested revisions for policies in adopting OER and reducing the costs of textbook materials in their courses. Identify rubric for evaluating OER work in line with the Boyer Model of Scholarship. Using the Boyer model and the Boise State University tenure and promotion guidelines, faculty who use and create OER should be able to present their work in tenure and promotion.
  - ❖ **Complete by:** drafts by May 2024
  - ❖ **Who's responsible or accountable?** Committee members
- Make suggestions and revisions to appropriate policy owners.
  - ❖ **Complete by:** May 2024
  - ❖ **Who's responsible or accountable?** Committee members, eCampus Center, Educational Access Center (EAC), Center for Teaching and Learning (CTL), eCampus Center, Faculty Senate and/or faculty members with support from the Provost's Office

Action Item 5: Develop comprehensive training and support for instructors
There are four aspects to this action item.
- Collect a list of the services available to instructors
- Albertsons Library, Center for Teaching and Learning, and eCampus Center will develop training processes for instructors.
- Learning Technology Solutions will provide Pressbooks support.
- Generate and brainstorm a list of workshops that need to be offered, such as OER and artificial intelligence.
  - ❖ **Complete by:** July 2023, ongoing, three times each year
  - ❖ **Who's responsible or accountable?** Albertsons Library, Center for Teaching and Learning, eCampus Center, Learning Technologies Solutions

Action Item 6: Communication and promotion of services and open education
Implement a multipart communication plan:
- Update website with current services
- Communicate and market services and opportunities
- Share out information via the Boise State Update
- Prioritize sharing stories about OER use
- Send direct information to students about course marking
- Offer education to leadership about OER and affordable learning with respect to academic freedom and quality

> ❖ **Complete by:** December 2023, then ongoing
> ❖ **Who's responsible or accountable?** Albertsons Library, eCampus Center, Committee Members

Action Item 7: Textbook and Material Adoption Process & Accessibility
There are two parts to this plan.

- Provide support and resources to help faculty textbook adoption process to ensure all materials are accessible and relevant
  - The Center for Teaching and Learning will complete an accessibility manual for instructors.
  - eCampus Center will continue to offer consultations
  - A subgroup of the University IT Accessibility Committee and the FACC will propose faculty development

  > ❖ **Complete by:** December 2023, then ongoing
  > ❖ **Who's responsible or accountable?** Bookstore, EAC, Library, eCampus Center, Faculty

- Develop understanding of department level contributions and use of institutional textbook adoption process

  > ❖ **Complete by:** August 2023, then ongoing
  > ❖ **Who's responsible or accountable:** eCampus Center, Faculty, Bronco Shop

Action Item 8: Implement strategies to reduce cost of textbooks and materials
- Explore additional innovative strategies with an analysis to feasibility and impact including, but not limited to the following:
  - Albertsons Library providing affordable materials by license to allow for courses to have access to the eBooks and online courses
  - Consider alternatives to inclusive access or traditional buying for items that cannot be licensed via the library subscriptions such as Scribd or other services and what that process for SARB would be
  - Inclusive access
  - Consultations provided by Albertsons Library, Center for Teaching and Learning, eCampus Center
  - Identify high enrollment courses or faculty interested courses and advocate for OER, OpenStax, Lumen Learning, library eBook, or inclusive access practices
  - Identify innovative practices to reduce the costs of textbooks and materials
  - Identify the feasibility of equitable access

  > ❖ **Complete by:** May 2024
  > ❖ **Who's responsible or accountable:** Committee members

Boise State University
Affordable Learning Action Plan 2023-2024   *4*

Boise State University: Annual Report, Instructional Materials Access and Affordability
Academic Year 2023 - 2024

EXECUTIVE SUMMARY

In academic year 2022/2023, Boise State University engaged significantly with State Board of Education Policy III. U, requiring postsecondary institutions to develop an affordable learning plan, and make progress toward achieving the plan's goals in support of access and affordability of learning materials. This work has been both structural, putting systems and processes in place to move smoothly forward in the years, and substantive, moving the university meaningfully towards the goal of increased affordability and access for our students.

ACTIVITIES OF AY 22/23

The sections below align with the action items identified in our Affordable Learning Initiative Action Plan, which is attached.

Action Item 1: Appoint Affordable Learning Materials Committee

In 2021/2022, the university formed a task force to develop a plan in response to Policy III. U. In. 2022/2023, this large group was re-formed as a smaller group to move implementation forward. This group, the Learning Materials Steering Committee, involves broad representation from across the university from units that have a role in affordable learning materials and open educational resources. In addition, the committee invited 3 student representatives to provide a student perspective on all aspects of the work of the committee. These students began attending regularly in the Spring '23 semester, and will continue to do so in future meetings (with new students invited in as committee member graduate):

- Amy Vecchione, co-chair (Assistant Director of Research and Innovation, eCampus Center)
- Daniel Sanford, co-chair (Director, Center for Teaching & Learning)
- Leslie Madsen (Associate Director, Center for Teaching & Learning)
- Mandy Nelson (Registrar, Office of the Registrar)
- Michelle Armstrong (Associate Dean, Albertsons Library)
- Michal Jarolimek (Associate Director, Bronco Shop)
- Kalista Barkley (Student)
- Melanie Figueroa Zavala (Student)
- Sarah Smith (Student)

The committee has been charged by Provost John Buckwalter to implement and update the university's plan for affordable learning materials, with the following charter:

The Affordable Learning Materials Steering Committee will coordinate and collaborate to organize actions and develop strategy to reduce the overall materials costs for students in their courses. This Steering Committee will collect those strategies to report regarding the Idaho State Board of Education Policy III U.

The group will:
- Provide updated plans and reports to the Provost's Office in fulfillment of the requirements of the State Board policies
- Increase student success and engagement through affordable and accessible ALM/OER materials
- Implement, through trial and testing with the Registrar's office, a course-marking system that makes it clear to students which courses reliably utilize zero- and very low-cost learning materials.
- Implement a plan, including responsibilities, outcomes, goals, and dates, for making the use of Open Education Resource (OER) materials more accessible & widespread at Boise State university.
- Implement other avenues (e.g., grant programs, faculty development) to make ALM and OER more widespread and equitably accessed at Boise State University
- Explore additional strategies other affordable textbook solutions (e.g.) institutional licenses for affordable textbooks
- Facilitate collaboration among the university's many student, staff, and faculty stakeholders in ALM and OER.
- Propose structures for implementing the plan developed by the committee, including both accountability from partners and future organizational structures.
- Increase student success and engagement by establishing key metrics.
- Encourage use of open pedagogy
- Advocate for and implement structures to make faculty work of OER visible, recognized, and fairly compensated
- Create a network of peer reviewers for OER utilizing a rubric

Action Item 2: Collect Data

The committee completed two important steps this year in gathering data essential for moving forward with the implementation of our Instructional Materials Access and Affordability plan. First, we gathered information from the faculty (through our annual Faculty Development Needs survey, to which we added additional questions) on the existing state of awareness of open educational resources and affordable learning materials at Boise State University. This survey yielded the information that, among 580 responding faculty:

- 13.19% *have used* OER in their courses.
- 13.54% *currently use* zero cost materials in their courses.
- 15.63% *currently offer* courses that use low cost materials.
- 4.17% *would like to create* OER for their courses.
- 5.56% *have created* OER for their courses.

The committee has also gathered relevant data from the Bronco Shop (the Boise State bookstore) on faculty adoption of affordable learning materials. The Bronco Shop collects course material adoptions

from all faculty and academic departments at Boise State University, including adoptions of OER materials and courses that are marked as NRT (No Required Text). This data (which is annually compiled into a spreadsheet that includes all active sections for any given term, and is shared with Albertsons Library and the Educational Access Center) includes course designation, assigned faculty, book titles, ISBNs, publishers, and available estimated prices. These data will be used to inform both the pilot and permanent plan for course marking (see Action Item 3).

Action Item 3: Develop a Systematic Course Marking Plan

The Steering Committee has put in place a pilot for marking the Boise State class schedule (the online system that students use to review and register for classes) with information on zero- and low-cost courses. We have identified the technology and capabilities that we will use in implementing a course marking system through PeopleSoft, and gathered the necessary information for the pilot with a survey of targeted departments that have been a part of the university's push towards more affordable learning materials.

The pilot, which will be unveiled for students in the Spring 2024 course catalog, will contain accurate information for a subset of Boise State University courses on their status as zero- or low-cost course sections. Students will be able to identify sections that they can be confident fall into one of these categories, and make selections accordingly. In this pilot, students will have information on 50+ sections that we have identified, in an initial review, as zero- or -low cost.

During the course marking pilot, we will be testing:
- our course annotation system in PeopleSoft
- our processes for identifying zero- or low-cost course sections
- our processes for reviewing the status of these courses so that information in the catalog is fully accurate
- the student experience of identifying and selecting zero- and low-cost course sections

Courses utilizing inclusive access models and fees are currently reflected in the student scheduling software PeopleSoft at the point of registration.

The results of this pilot will inform a more comprehensive rollout in academic year 2024/2025.

Action Item 4: Identify Policy Updates

In AY 22/23, the committee identified our preliminary priorities for policy updates which will be vetted with the faculty and other groups in upcoming years. These are:

- Clearly articulate the role of OER in the tenure and promotion process for faculty.
- Update policy 9200 (which establishes "policy defining the operations, functions, and responsibilities of the Boise State University Bronco Shop") with accountability options regarding instructor responsibilities for faculty on providing accurate and timely updates on course materials.

These priorities have been developed in conversation with the Office of the Provost, and have centered around the shared goals of aligning OER within the Boyer Model for scholarship, and to modernize the tenure and promotion process to honor work in the area of making learning affordable for students.

Action Item 5: Develop Comprehensive Training and Support for Instructors

In academic year 2022/2023, the committee completed a survey of all of the existing services (faculty development, informational resources, technology, hands-on support, information) that currently exist to support instructors in the use of affordable learning materials and open educational resources. Based on these findings, the task force has identified current gaps that we have used to inform the action plan, as well as the goal of facilitating greater coordination between existing units, and clearer delineation for individual units regarding their roles with respect to providing services. eCampus Center began offering the Open Education Development Series in spring 2023.

Action Item 6: Communication and Promotion of Services and Open Pedagogy

A robust affordable learning materials website is now in place (https://www.boisestate.edu/oer/); in the year ahead we will work to update this site as we implement more resources and support.

Action Item 7: Textbook and Material Adoption Process

The committee coordinated with the University IT Accessibility Committee, setting benchmarks for university-wide standardization of accessibility in course materials and beginning a discussion on accessibility in the creation of OER materials. The committee also met with the AI in Education Taskforce to discuss the potential for Generative AI to play a role in the development of OER materials, and the need for the development of standards and guidelines for doing so ethically).

Action Item 8: Implement Strategies to Reduce Costs of Textbooks and Materials

The committee has worked with participating units to develop clear strategies for reducing costs to students. Proceeding from these discussions, Albertsons Library has developed processes for reducing costs to students that will be implemented within their annual budget process. In particular, the Library will use Bronco Shop data (see Action Item 2) to identify textbooks that the library can license ebooks of. Additionally, the Library will provide access to streaming videos, used by classes across campus, which will educate students on low-cost options for accessing course materials.

UPDATE ON INSTITUTIONAL PLAN

Significant changes have been made to our (attached) institutional plan. Specifically, we have 1) Reorganized it to clarify action items, 2) Developed a more clear timeline for implementation, 3) Identified individuals responsible for implementation of specific aspects of plan, and 4) Identified on-going and semesterly tasks. These changes have been made with the goal of making implementation more straightforward.

Action Items Table

Idaho State Board of Education Policy III U Required Elements Aligned to Action Plan

Policy Element	Required Element	Party Responsible	Action Item(s)
2 a 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.)	Committee members, eCampus Center, Educational Access Center (EAC), Center for Teaching and Learning (CTL), eCampus Center, Faculty Senate and/or faculty members with support from the Provost's Office	4, 7
2 a 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	Committee members, eCampus Center, Educational Access Center (EAC), Center for Teaching and Learning (CTL), eCampus Center, Faculty Senate and/or faculty members with support from the Provost's Office	4
2 a iii	Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials	Albertsons Library, Center for Teaching and Learning, eCampus Center	5
2 a iv	Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials	Albertsons Library, Center for Teaching and Learning, eCampus Center	5
2 a v	Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.	Albertsons Library, Center for Teaching and Learning, eCampus Center	5
2 a 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	Registrar, Bookstore, Institutional Effectiveness, eCampus Center, Committee members, Bronco Shop, Provost's Office	2, 3
2 a 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	Registrar, Bookstore	2, 3
2 a 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.	Committee members	2, 8

Action Plan Numbers Aligned to Idaho State Board of Education Policy III U

Action Plan Number	Action Item and Brief Description	Deadline	Responsible Party	IdSBOE Policy III U Section
1	Appoint Affordable Learning Committee	complete	Steering Committee	2 b v
2	Collect data	annually fall	Institutional Effectiveness, Faculty Affairs Coordinating Council, eCampus Center, Committee members, Bronco Shop	2 a viii
3	Course Marking Pilot	July 2023	Bronco Shop, Registrar, Committee Members	2 a vi
3	Course Marking Comprehensive Plan	each semester	Bronco Shop, Registrar, Committee Members	2 a vi
3	Make course marking more visible	December 2023	Student representatives and Registrar	2 a vi
3	Course Marking automatic charge	Complete	Bronco Shop, Registrar	2 a vii
4	Policy updates	May 2024	Committee members, eCampus Center, Educational Access Center (EAC), Center for Teaching and Learning (CTL), eCampus Center, Faculty Senate and/or faculty members with support from the Provost's Office	2 a ii
5	Develop comprehensive training and support for instructors	July 2023, then once per semester	Committee members, Albertsons Library, Center for Teaching & Learning, eCampus Center	2 a iii
6	Communication and promotion of services and open education	December 2023, then once per semester	Albertsons Library, eCampus Center, Committee Members	2 b v
5	Offer programs and incentives for instructors	April 2023, then ongoing	eCampus Center, Albertsons Library, Center for Teaching and Learning	2 a v
7	Textbook and material adoption process and accessibility	December 2023	Faculty Senate	2 a i
8	Implement strategies to reduce cost of textbooks and materials	May 2024	Committee members, Albertsons Library, Center for Teaching and Learning, eCampus Center	2 a iv

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 effects 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 pathway. Two employees were selected to co-chair the committee, including a faculty member and an instructional designer with a deep background in OER materials. The committee, made up of faculty and staff members, has made great progress towards the creation of the degree pathway. The pathway for an Associate of Arts and an Associate of Science has been created. All classes have been identified in an Associate of Arts and Associate of Science Degree that fall within the zero-cost textbook pathway. The committee has worked with the office of the registrar to mark the courses a student would take to obtain an AA or AS 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 participating in a community college statewide OER initiative (Project Z-Degree), which provided $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 rights.

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.

  o CEI often has loaner copies of digital books in print form. Students can obtain these resources through the library or through other departments like the Center for New Directions.

- *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.

- o CEI has the Z-Degree compensation levels to assist faculty in switching to these options.

- *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. In the CEI Z-Degree documentation, faculty have the option to indicate if they would like to share their resources with other instructors and/or 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 has been deployed and we continue to work with the registrar's office to keep the list accurate as new courses are added.

- *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

Instruction and Academic Affairs

ANNUAL SBOE REPORT | TEXTBOOK AFFORDABILITY
6.13.2023

Original plan elements and progress report

As per the instructions provided by the Office of the State Board, the following are actionable items from the College of Southern Idaho plan as originally written. The currently requested progress report appears in bold text.

- *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.

  o **Significant progress has been made in terms of faculty support. The co-chair of the internal textbook affordability workgroup is now a member of the *Teaching and Learning Center* which provides course design assistance to faculty including the adoption of low and zero cost learning resources. The CSI Library has added a staff person whose primary role is supporting faculty in identification, adapting, adopting, or creating course content in conjunction with Project Z-Degree. All content is considered for accessibility. The CSI Board of Trustees approved a new Textbook Adoption Policy that outlines priorities for text selection including quality and cost. The policy was largely authored by the CSI Faculty with administrative guidance and is attached for SBOE information**

- *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.

  o **As noted above, the CSI Trustees have approved a new adoption policy primarily written by CSI Faculty. Independent of the policy, CSI faculty have significantly**

reduced textbook costs. Over the past five years, overall cost for new textbooks has been reduced by at least 50%. (see other data below)

- *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.

  o **Project Z Degree has provided significant resources for faculty stipends as well as professional development efforts. The staff positions mentioned above alongside the CSI Project Z Degree point of contact provide tremendous support for faculty. The primary barrier for participation is a lack of time, although we are optimistic that much work will be completed over this summer in support of a significant impact for Fall 2023 based on textbook requisition data.**

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

  o See the first and second bullets above

  o **In addition to the references and progress noted above, consistent messaging from the President, Provost, and academic leaders have provided prompts and expectations for faculty. The new policy reinforces that expectation. There are no plans to incentivize participation in the pursuit of lower textbook costs, although CSI will soon employ course marking that will likely influence faculty to participate more fully in seeking OER and other low cost resources.**

- *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.

  o **CSI has participated significantly in the creation of a repository of OER for statewide GEM courses. This activity was led by CSI Library employee Reed Hepler in conjunction with the Network of Idaho Academic Libraries OER Standing Group. .**

  o **The Pressbooks catalog is another avenue for sharing and CSI has also contributed to this inventory of resources with adoption by others out of state.**

  o **No changes and no expected efforts to *incentivize* sharing, although this is an expectation. At the Fall 2023 inservice the Office of the Provost will sponsor an OER Showcase with faculty describing their experiences in adoption of their learning resources and sharing with their colleagues.**

- *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.

  o **Pending. The new SIS is behind schedule, but should be fully operational in summer 2024.**

- *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.

  o **CSI is on track for zero textbook cost degrees in General Studies and Education by Fall 2024. This requires that the General Education core is available via zero textbook costs, but also requires that the particular sections of those GEM courses are clearly identified in various ways (while all GEM courses have a section available with zero cost, not all *sections* employ them). Emphasis is definitely being placed on courses offered as dual credit in order to better support high school students and school districts.**

  o **CSI will continue to contribute to the repository for OER in support of statewide GEM courses created by The Network of Idaho Academic Libraries OER Standing Group.**

Related points of interest

Program review

Instructional deans have recently completed the analysis of program review processes and noted the significant increase in mention of textbook and learning resource adoption in support of program quality and affordability. This is a clear indication that momentum is growing, and progress will continue.

Data

Of greatest import moving forward is the establishment of clear standards for data and data collection. The attached charts show the tremendous progress being made but is based almost entirely on the former textbook requisition process and bookstore purchasing data. These data do not typically indicate what specific resources have been selected, but only if requisition has occurred through the bookstore[1]. This results in data that are likely under-reporting the use of alternative (especially zero cost) resources. Over the next year CSI will establish a clear methodology to ensure that we have reliable and consistent data regarding the precise cost of learning resources.

The data do provide a glimpse into the good work that the CSI Faculty have been doing in supporting lower cost resources:

- New and used textbook costs overall have been reduced by nearly half over the past five years.

- Zero textbook cost sections have increased by 49.5% since Fall 2020 and 11.2% since last fall.

- Total bookstore requisitions (indicating zero cost sections) have decreased by 24.5% from Fall 2020 and nearly 20% since last fall.

- Known OER sections have increased 44% over Spring 2023 (due largely in part to Project Z Degree).

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[1] The plan has not yet been vetted by CSI constituent groups and should thus be considered a draft plan. A final version will be made available upon adoption.

Faculty interest and participation

CSI Faculty have been remarkable in their efforts to lower costs and provide excellent learning resources. It should be noted that the progress indicated by the data happened without any formal prompts or policy, just the consistent expression of expectations.

Next steps

- Build on the progress to date and remain vigilant. Idaho Launch may be a prompt for less attention to cost of attendance, but the current momentum must continue.

- Data collection procedures require attention and correction to ensure proper documentation of progress, especially the identification of OER and other zero cost options that do not appear in bookstore data.

- Course marking procedures identified and implemented in new SIS.

- CSI remains committed to the goal of becoming a zero added textbook cost institution and are making progress in that pursuit.

CSI Plan Updates

- The unofficial updated CSI III.U. plan and data report slide deck are attached.

COLLEGE OF
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OFFICE OF THE PROVOST

Instruction and Academic Affairs

LEARNING RESOURCE AFFORDABILITY PLAN (DRAFT)
6.13.2023

While CSI is not legally 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.

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, the Teaching and Learning Center (TLC), and the CSI Library. The newly approved Textbook Adoption Policy will require a refinement of the actual adoption process by faculty/departments.

- *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 Policy and procedure refinement, together with data definition, collection, and reporting are all planned for the coming academic year.

- *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 continued 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.

  o Fall 2023 Inservice will include a Faculty Showcase of OER and other zero cost material adoptions and implementations.

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

  o See 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. There are no current plans to incentivize, but to set expectations for the application of best practice.

- *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 will likely be fully deployed in summer 2024.

- *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 CSI is on track for zero textbook cost degrees in General Studies and Education by Fall 2024. This requires that the General Education core is available via zero textbook costs, but also requires that the particular sections of those GEM courses are clearly identified in various ways (while all GEM courses have a section available with zero cost, not all sections employ them). Emphasis is being placed on dual credit in order to better support high school students and school districts.

  - o Measurable institutional goals will be set in conjunction with data definitions to ensure that progress is properly and reliably documented and communicated.

COLLEGE OF SOUTHERN IDAHO

Textbook and Learning Resource Adoption

Policy number:		Last revised and approved:	00.00.0000
		Effective date:	Click here to enter text.
		Last reviewed:	

Purpose

The College of Southern Idaho recognizes that the rising cost of textbooks must be addressed to maintain access and affordability for CSI students. This policy is being implemented to balance textbook and learning resource costs with quality pedagogy, as well as providing consistency and clarity to adoption procedures throughout the College

Idaho Code §33-2109 vests textbook adoption responsibility with the CSI Community College District Board of Trustees. This policy serves to clarify for the Trustees how that responsibility is delegated to the Faculty with oversight by the Office of the Provost. In no way does this policy circumvent or supersede the explicitly stated powers of the Trustees with regard to textbook adoption but balances that responsibility with the need for academic freedom and the role of Faculty in textbook selection. This policy provides guidance from the Trustees to the Faculty by setting expectations and parameters desired by the Trustees.

Definitions

Inclusive AccessA textbook sales model that adds the cost of digital course content onto the students' account along with their tuition and fees. This also allows students to have day one access to their course materials through the Learning Management System. Oftentimes, a course that requires a physical copy of a book can participate in the Inclusive Access program and work with the bookstore to obtain physical resources as required. Another name for the inclusive access model is automatic charge.

Open Educational Resources (OER)
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.[1]

Learning Resource
Any required or recommended content support for use in a particular course, including but not limited to textbooks, periodicals, learning management support systems, safety equipment, and tools. May be consumable or non-consumable materials.

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[1] Definition from UNESCO website

I.   **Policy**

   A.   Academic Freedom

      1.   Textbooks are identified and recommended by individual faculty members subject to approval by the Department Chair. This practice is consistent with CSI policy regarding academic freedom, accreditation standards, and current case law and allows faculty to make individualized choices regarding pedagogy.

   B.   Textbook Adoption Guidelines

      1.   Faculty are expected to minimize the cost of textbooks and other course materials for students while maintaining the quality of education and academic freedom.

      2.   Faculty members ensure that a significant portion of each assigned textbook will be used in the course. Textbooks and supplements that are not heavily used in a course should be listed as optional.

      3.   Faculty should carefully consider the content of new versus existing editions of textbooks. Publishers must disclose substantial content revisions made between the current edition of the textbook and previous editions. If the new version does not contain enough substantial changes to warrant changing, faculty may consider staying with an older edition. It is acknowledged that in many cases older editions are not easily obtained and new editions must be adopted.

      4.   Faculty are encouraged to consider using lower-cost alternatives to new hard-bound textbooks, such as loose-leaf or custom bundles.

      5.   If a Faculty member is using a physical book in a course, they are encouraged to have a copy placed in the reserve section of the Library for student use.

      6.   The content in the course resources should be current and relevant.

   C.   Resources to Consider

      1.   The intent of the policy is to provide controls for the total cost of education while balancing the need for the best available learning resources. Therefore, consideration shall be given to textbooks and other resources in the following order of priority:

         a)   Zero cost resources

            (1)   No required text or freely available materials as designated by the instructor

            (2)   Open Educational Resources (OER)

         b)   Low and very low cost resources

            (1)   Inclusive access

            (2)   Textbooks and other resources meeting the threshold for low and very low cost (see II.D. below)

         c)   Other learning resources

            (1)   Textbooks and/or materials that do not meet the zero cost, very low cost, or low cost thresholds (see II.D. below).

Portions of this policy have been adapted from the policies at other institutions, including University of Maryland Baltimore, Idaho State University, and Harford Community College

2. In all cases, the final selection/recommendation must also consider the specific value and support for the students' success. Requiring a specific text or other learning resource must include reflective course design and consideration for the optimal student experience. The Teaching and Learning Center (TLC) staff is available to assist and advise regarding course design to support any learning resource.

II. Procedures

A. Process for Textbook Adoption and Deadlines

1. All textbook requisitions must be done through the bookstore textbook requisition website

    a) The website has all courses sorted by department and course section.

    b) The instructor of record shall be responsible for submitting the textbook requisition. In some cases, a departmental committee selects texts, but individual faculty must still submit individual requisitions.

    c) Department Chair should ensure that all courses taught by adjuncts have textbook requisitions submitted.

    d) Requisitions mustnote all materials on the requisition website—including OER, No Text, Inclusive Access, other required texts, and consumable and non-consumable materials. The goal is for students to have no surprises on the 1st day of class, so all materials must be noted.

2. Once a faculty member has submitted a textbook requisition, it is then forwarded to the assigned Department Chair for approval.

3. If the Department Chair declines the selected materials, the requisition is sent back to the instructor with explanations. The faculty member is then required to submit a new textbook requisition for approval by the Department Chair or begin dialogue regarding the declined requisition to obtain approval.

4. By submitting the textbook requisition, a faculty member acknowledges that they have considered all the above-outlined guidelines and are prepared to describe their decision logic to the Chair

5. All textbook orders are due 2-3 weeks before registration opens for both the Fall and Spring semesters. Deadlines are sent in an email to Faculty and Department Chairs from the Bookstore. This allows time for the bookstore to verify purchase prices and update any course markings as needed. Faculty are encouraged to submit the textbook requisitions before the deadline to allow ample time for the bookstore to obtain the best pricing.

6. Once prices are verified by the bookstore, they are posted and available to view on the bookstore website www.bookstore.csi.edu upon registration date for students to view before registering for courses.

B. Open Educational Resources Process

1. Support is available on campus for those Faculty members who are interested in using OER in their courses. There is a member of the library staff who specializes in OER resources.

Portions of this policy have been adapted from the policies at other institutions, including University of Maryland Baltimore, Idaho State University, and Harford Community College

C.   Billing Practices

1.   Automatic charge fees (also known as nclusive Access) are billed directly to student accounts unless they opt out within the published deadlines. Deadlines are provided to the student on both the bookstore website and several emails prior to the start of the semester.

2.   Upon approval from the Office of the Provost, academic departments may charge a course fee to students to cover the costs of textbooks and materials. In certain cases it may also be appropriate to charge a program fee for learning resources. Program fees must be approved by the Board of Trustees.

3.   A course fee may be charged to courses that are using OER. The funds will be used for future resource refinement and maintenance purposes.

4.   Through a combination of various funding sources, the College will make every effort to continue to reduce and theoretically eliminate any added learning resource costs for students not included in tuition and fees.

D.   Course Markings

1.   All course sections in the registration system will be marked in the following manner in alignment with the definitions provided by the Idaho State Board of Education Policy III.U

a)   Zero cost means a total materials list price of $0

b)   Very low cost means a total materials list price of $1 to $30

c)   Low cost means a total materials list price of $31 to $50

Portions of this policy have been adapted from the policies at other institutions, including University of Maryland Baltimore, Idaho State University, and Harford Community College

Textbook affordability report

CSI BOARD OF TRUSTEES | MAY 15, 2023

office of the provost
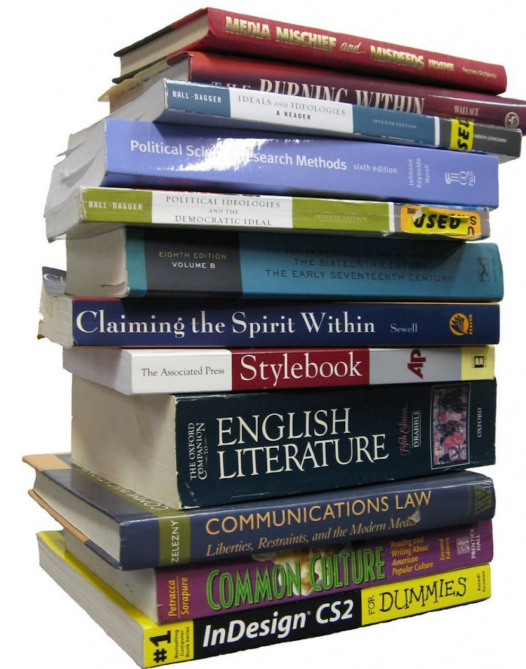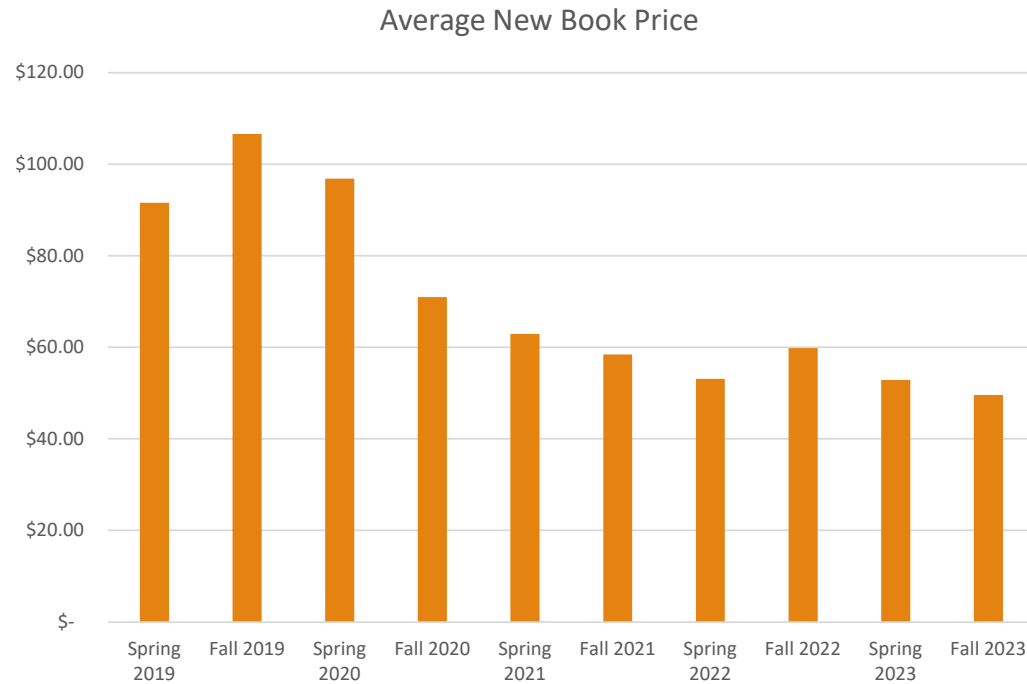
progress report

- State Board of Education report
- Project Z-Degree
- Excellent campus work
- Acknowledgements
  - Faculty workgroup
  - Jayme Ketterling | Candace Boesiger
  - Janea Triplett-Newell | Reed Hepler
  - CSI faculty/department leadership

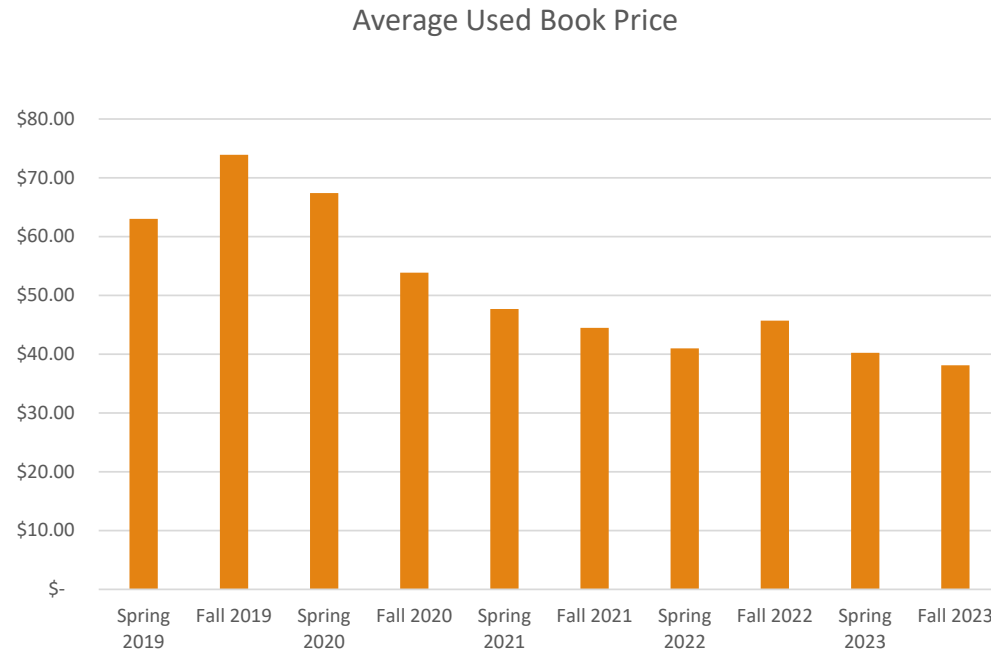# new textbook cost

Average New Book Price

- Down 17.1% from last fall
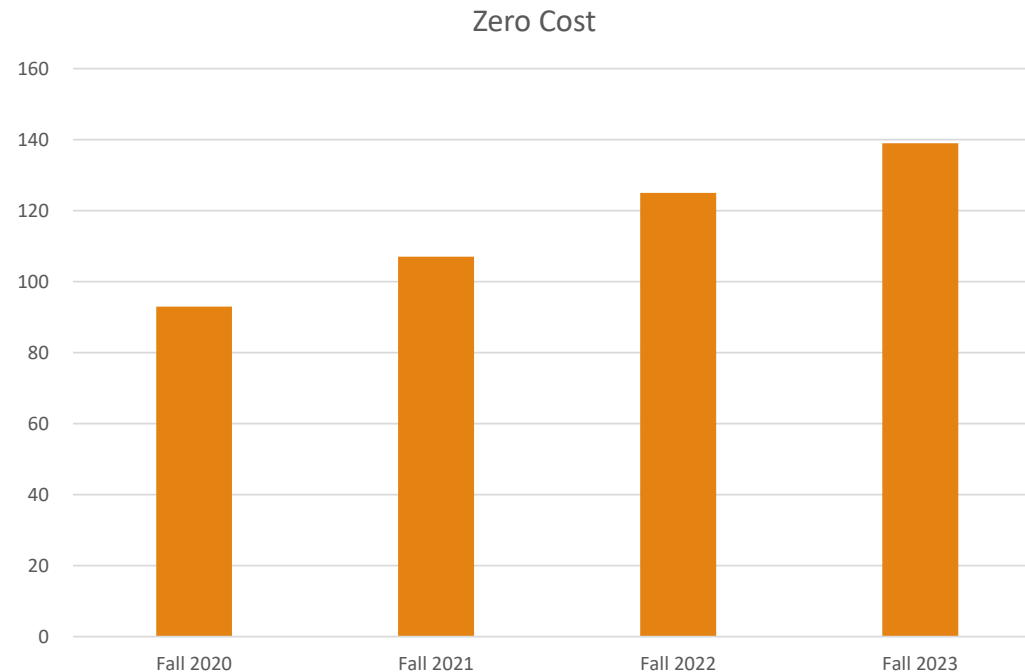- Down 53.5% from Fall 2019

used textbook cost

Average Used Book Price

- Down 16.5% from last fall
- Down 48.4% from Fall 2019
- Overall cost of used is less than new

zero textbook cost sections
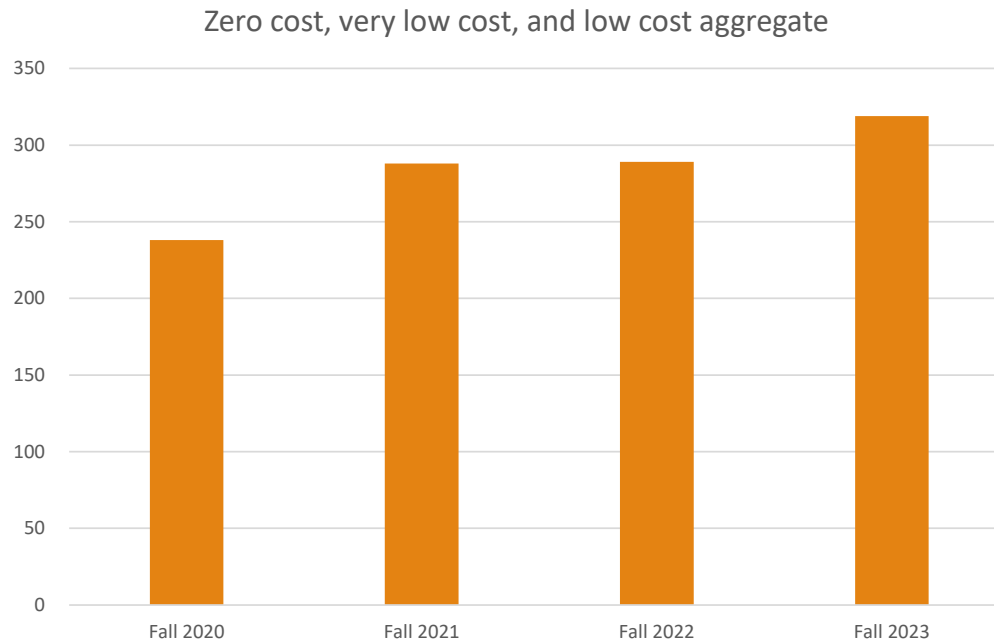
Zero Cost

- Data may be incomplete
- Up 11.2% from last fall
- Up 49.5% from Fall 2020
- Numbers of sections per semester is not static

office of the provost

zero and low cost sections

Zero cost, very low cost, and low cost aggregate

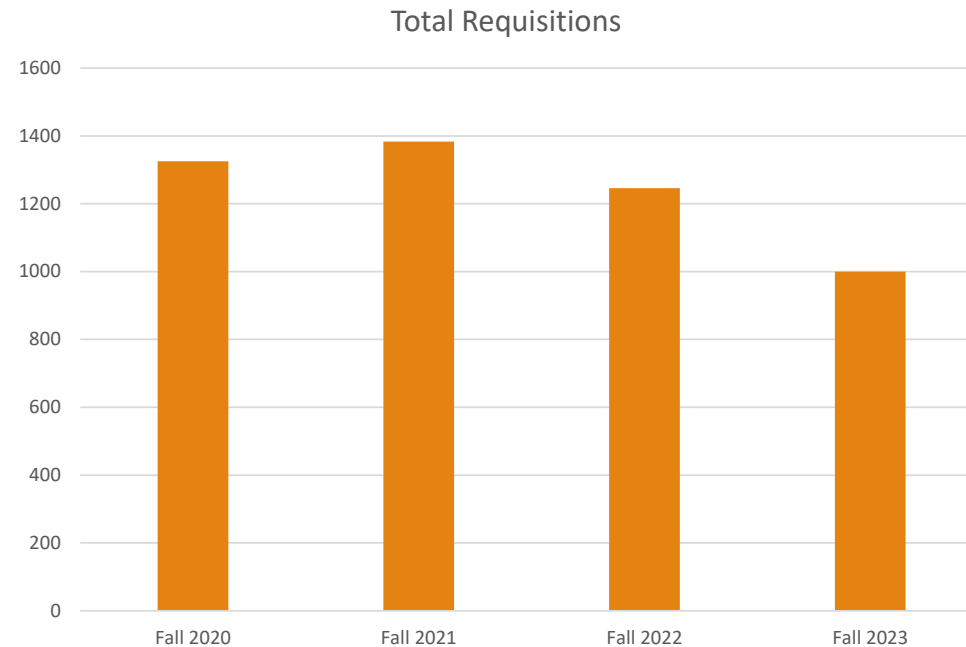- Very low cost: < $31
- Low cost: $31-$50
- Up 10.4% from last fall
- Up 34.0% from Fall 2020
- Again, section numbers vary

office of the provost

sections with requisition

Total Requisitions

- Down 19.7% from last fall
- Down 24.5% from Fall 2020
- These may be actual zero textbook cost sections

office of the provost

OER sections
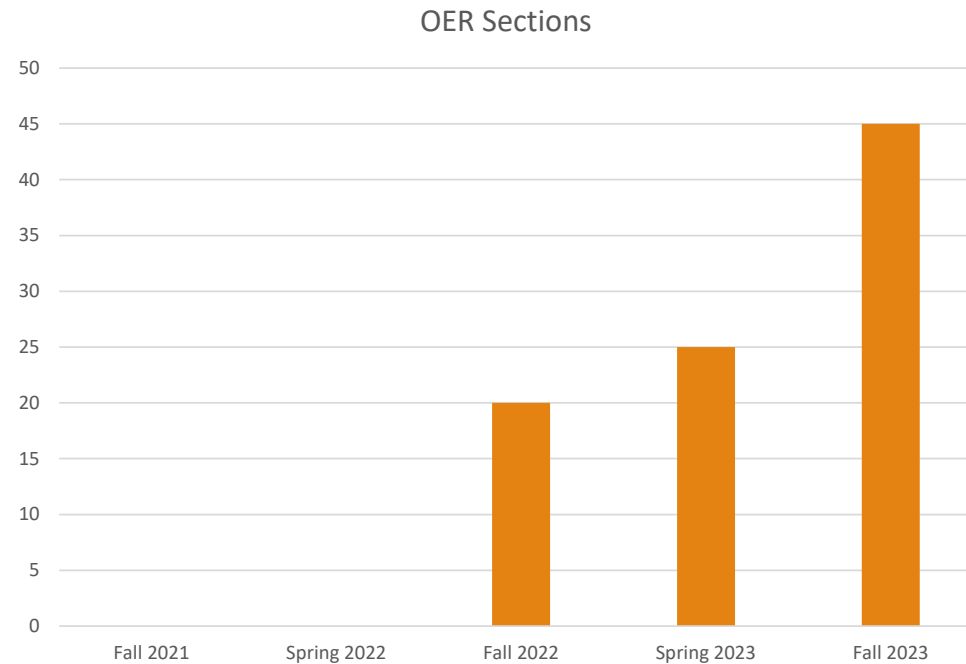
- Up 44.4% from last semester
- Project Z-Degree

summary and next steps

- Continue excellent progress, stay vigilant especially with regard to Idaho Launch

- Written report to State Board in June

- Focused attention on OER and zero textbook cost sections

- Course marking and improved data collection methods

- Retain goal of zero added textbook cost institution

office of the provost

Goal One: Ensure all instructional materials are relevant and accessible

- As of June 2022, all CWI instructors must adhere to the Instructional Materials (IM) Selection and Disclosure Policy. This policy encourages faculty to consider cost and accessibility of instructional materials used in the classroom every 3 years.
- Beginning in 2020, the Center for Teaching and Learning (CTL) have supported an accessibility tool check called Ally that helps faculty assess and correct the level of accessibility of all instructional materials uploaded in their courses and has provided faculty training on this tool.
- Currently six Open Educational Resources (OER) textbooks remixed by our instructors are hosted on the CWI Pressbooks site where they are accessible to students and instructors from CWI and around the world. CWI Library has supported this effort as they can with current staff since Spring 2022, but is hoping to bring on a full-time staff position for this.

Goal Two: Minimize the cost of instructional materials for students

- Starting in Fall 2022, CWI instructors saved students significant amounts of money on textbooks in required Common Indexed courses by implementing 0 cost instructional materials:
  - ENGL 101 and ENGL 102 where textbook costs varied from $24-60
  - COMM 101, previous textbook cost: $62
  - MATH 143, 147 (Fall 2023) and 170 (Spring 2023), previous textbook cost: $72
  - CHEM 111, previous textbook cost: $57
  - HIST 111 and HIST 112, previous textbook cost: $140
  - PHIL 101, previous textbook cost: $88
  - PHIL 103, previous textbook cost: $90
  - SOC 102, previous textbook cost: $60
- Starting in Fall 2022, CWI administration has focused on special course fee processes and updates that include how automatically charged instructional materials are managed and limits to special course fees. This work is expected to be an approved process in the next few months.

Goal Three: Increase professional development (PD) OER opportunities

- Starting in Fall 2022, CTL began curating a series of resources and trainings on OER topics that instructors can take including training on the following topics: OER basics, OER certification course, OER accessibility, LaTex language for equations, Creative Commons, and Pressbooks.
- Funding for instructor participation in wider PD opportunities such as online conferences have been made available to instructors through the Z-degree initiative funds. For example, seven instructors attended the Virtual Open Education Conference in Nov. 2022.
- CWI Instructors who are skilled in various aspects of OER have presented to interested instructors on topics such as Creative Commons licensing, LaTex use in Math and Science OER, Pressbooks accessibility and Pressbooks creation.
- In Spring 2023, as part of CWI Professional Development Day, an OER Achiever Award was given out to an outstanding instructor who developed one course using OER during Spring 2023 and has committed to develop two more courses using OER for Fall 2023.

Goal Four: Support instructor adoption and use of OER

- In Spring 2022, an OER Committee was formed to increase instructor use of OER and implement at least one Z-degree (all low-cost IM pathways in AA or AS degrees) by Fall of 2023. The stakeholders on this committee represent staff from CTL, the library, OER first adopters and instructional deans. By Spring 2023, this committee expanded to include staff from the registrar, bookstore, accounting, grants and marketing. The committee has met weekly since Fall 2022.
- Starting in Spring 2022, the CWI OER committee developed trainings in support of OER use and adoption and available to all staff and faculty on our LMS.
- Starting in Spring 2022, the OER coordinator has held meetings on OER including bi-annual in-service meetings and bi-monthly meetings on the topics of OER including its benefits to students and instructors.
- Starting in Spring 2022, the OER committee created a process to award and oversee stipends from money given by the State of Idaho for the creation of a Z-degree at CWI and other community colleges (CC). So far, 39 instructors have applied for stipends and three Z-degree pathways will start operation in Fall 2023, COMM.AA, PHIL.AA and LIBARTS.AA
- Starting in Fall 2022, the OER coordinator has met at least monthly with Merlot, a 3rd party vendor in charge of helping the four Idaho CCs create Z-degrees, organize their OER plans and collect data on the success of these efforts. This implementation plan is one of the milestones.
- Since Fall 2022, CTL and the library have devoted staff hours to helping instructors find, remix, publish and implement OER into their courses. This includes contacting instructors who have expressed interest in OER, meeting with them one on one and supporting the sharing of their OER work on the CWI Pressbooks site.

Goal Five: Encourage Instructors to publicly share created OER

- Starting in Fall 2022, stipend support for publishing instructor created OER on the CWI Pressbooks site has been given using funds given by the State of Idaho for Z-degree creation. So far, six faculty have published their work on this site.
- Instructors who are involved in the OER stipend process are encouraged to complete training on how to use Pressbooks to make their OER resources available. Completed training is recognized with a stipend of $250.
- The CWI library has designated one of their staff to oversee the Pressbooks instance and help any instructor willing to publish their OER material on this site.
- Starting in Spring 2023, the OER committee is planning to identify an instructor willing to convert CWI instructor created OER materials to a Pressbook in exchange for stipend support using the funds available from the state for this purpose. This mechanism would be used when instructors do not have the time or willingness to learn how to publish their own material in Pressbooks.

Goal Six: Identify by course marking all zero to very low-cost IM course sections at time of registration

- Starting in Spring 2022, stakeholders including the registrar, the bookstore, the business office and the OER committee began working on a process for course marking. By April 2023, this

process was put in place and involves identifying all courses where all sections taught use zero to very low-cost IM, identifying individual sections of courses that used zero to very low-cost IM from the previous semester's book costs, and contacting department chairs with that information to identify in our course creating software individual sections of all scheduled courses for the upcoming semester that are zero to very low-cost with a 'Z-degree' note. All Fall 2023 courses that have zero to very low-cost materials were marked by the time of early student registration on April 10 with the following icon:

- In April 2023, a marketing campaign making students aware of 'Z-degree courses' and includes a printable flyer, press releases and a website.
- At the end of March 2023, awareness meetings were held with student advising and One Stop staff on how to help students identify and sign up for Z-degree course sections. The OER coordinator distributed resources to them to help them communicate this initiative.

Goal Seven: Identify by course marking all course sections using automatic charges for textbooks at time of registration

- All courses that include an automatic charge for textbooks as well as other added course fees are currently marked at time of registration with the following icon:
- The course section descriptions include the type of automatic charge and the cost (ex): Include Ed Course Fee: $xxx

Goal Eight: Improve use of OER and very low-cost IM in common-indexed courses

- For common indexed courses that have already implemented OER see Goal Two above
- The OER coordinator uses the existing bookstore cost list and common indexed course list to identify additional courses that might benefit from OER and contacts the department chairs on this topic. From this, additional common indexed courses in Math, Humanities and Social Sciences have started the process of moving to OER. The goal of the OER coordinator is to identity courses which most students take in each GEM area as a priority for these discussions.

Goal Nine: Improve use of OER in non-common-indexed courses

- From Spring 2022 to now, the following non-common-indexed courses have implemented OER: CWI 101 (first-semester experience course), AGRI 120, ARTS 101, 104, 212, 215, 231,250,275,290; CHEM 112; all upper division COMM and PHIL courses; MRKT 245,290; PSYC 140, 250, 251, 290, 293; SOC 230, 290.
- The goal of the OER committee is to add one new Z-degree each academic year. This maximizes the non-indexed course increases as each upper division require course in a Z-degree will also be non-common-indexed courses.

Goal Ten: Include OER work as part of Tenure and Promotion Processes

- The OER coordinator is currently in talks with the Tenure and Promotion committee to regularize language and placement on faculty's FPAR (tenure report) for OER work.

Idaho State University

Strategies To Increase Access and Affordability of Instructional Materials

2022 - 2023 Annual Update

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Strategies To Increase Access And Affordability of Instructional Materials

2022 - 2023 Annual Update

During the Spring of 2022, Idaho State University developed an Access and Affordability plan offering eight strategies to enhance the use of Open Educational Resources (OER) and low cost materials by Idaho State University instructors. These strategies were built on programs, resources, and incentives, which were currently in place or intended to be launched during the Spring 2022 semester and the 2022-2023 academic year. The eight recommendations primarily target faculty support and cost minimization of instructional materials. ISU's numerous accomplishments for the 2022-2023 academic year are provided below.

1. **Continue to Support Existing OER and Low Cost Resources and Incentives**
   ISU continued to offer two annual 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 Workshops.

   ISU has celebrated Open Education Week annually since 2021. Our most recent celebration was offered in March 2023. The numerous Open Education Week events are organized and facilitated by the Open and Affordable Educational Resources (OAER) Committee within the ISU University Libraries. This committee is made up of both librarians and instructional designers. The 2023 week's educational programming consisted of virtual presentations provided by recent Textbook Hero Honorees, and additional educational presentations about discovering OER, using H5P interactive learning software, and OER "basics." The event had over 100 in-person registrants. Videos are available on the ISU Open Education Week Events Playlist.

   This year's Open Education Week Keynote Address was provided by Dr. David Wiley. Dr. David Wiley is the Chief Academic Officer of Lumen Learning, the President of the Association for Educational Communications and Technology, and an Education Fellow at Creative Commons. Dr. Wiley has been crucial in the OER movement. He coined the term 'open content' in 1998, and wrote and published the Open Content license for educational resources - a forerunner to Creative Commons licenses. His work helped establish the essential legal framework and licenses that constitute the foundation of the movement today. In recent years he has worked with leaders in higher education to institutionalize OER, in order for more and more students to benefit. Dr. Wiley's Keynote address was an inspiring tribute to the OER work that continues to help ensure educational access and opportunity across our region, nation, and world.

   During the Fall of 2022, ISU's Program for Instructional Effectiveness (PIE) sponsored a workshop on finding OER materials for ISU faculty. Spencer Jardine, Associate Professor,

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and Library Coordinator of Instruction, delivered the workshop, Strategies for Finding OER Materials, on October 12, 2022 via Zoom and in person.

Among the topics discussed in the workshop were the variety of types of OER materials, and the likelihood of finding duplicate OER materials--an implication of the open license associated with these materials. Discussion also included a review of characteristics and offerings of major OER publishers/collections, and basic premises upon which the concept of OER is constructed. Mr. Jardine noted that some OER creators also provide ancillary materials that include quiz questions and other learning activities that can be embedded in content management systems. Lastly, the discussion touched on the use of low-cost or otherwise affordable resources, such as library resources. The presentation and other resources may be found on the PIE website under Resources.

2. **Update University Class Registration System to Include Course Markings**
Beginning with the Spring 2023 semester, a new course marking scheme utilizing "section attributes" within ISU's course scheduling software system, was made available for collecting instructional material cost information. The section attribute displays instructional material costs in the university course schedule by price bands. This information can be filtered based on search criteria utilizing the following three definitions detailed in Idaho State Board of Education 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.

In our first semester of implementation (Spring 2023), ISU offered 232 course sections with zero, very-low, or low-cost instructional materials. These courses served 3,694 students, with 2,196 students in the zero cost materials sections, 878 students in the very-low cost materials section, and 620 students in the low-cost material sections. The decreased instructional material costs provided a total of $330,681 in cost savings for students during Spring 2023.

In order to calculate the total cost savings to students, it should first be noted that substantial variation exists in the average cost of college textbooks, with estimates indicating that average textbook costs range between $80 - $150 per textbook. There is also significant variation in average textbook costs by discipline. To provide conservative estimates, we follow the cost-savings approach utilized by the Open Oregon Educational Resources, by assuming an average of $100/textbook. The average cost of the OER textbook materials for each section was calculated based on the mean average of the cost materials (i.e., $0 for zero cost, $15.5 for very-low cost, and $40.50 for low-cost option). With the number of students enrolled, a cost-saving of $219,600 is estimated for students enrolled in the zero cost option ($100 x 2,196), a cost-saving of $74,191 is estimated for students enrolled in the very-low cost option ([$100-$15.5] x 878), and a cost-saving of $36,890 is estimated for students enrolled in the low-cost option ([$100 - $40.50} x 620).

Idaho State University

Thus, a total of **$330,681** is estimated as the cost-savings associated with the decreased instructional material costs for students during the Spring of 2023.

3. **Promote and Support the Inclusion of OER and Affordability Work in Evaluation and Promotion Guidelines**
A critical part of sustaining OER in higher education is recognizing the contributions by faculty who create and adapt such resources as part of their teaching, research, or service. As one example, the College of Education is committed to honoring OER work and is beginning conversations about how to formally recognize these contributions in the promotion and tenure process. The Provost's Office supports this approach and, while recognizing that tenure and promotion criteria are generally decided upon at the college level, the Provost is nevertheless committed to encouraging college level administrators to engage in conversation with the faculty across the institution to consider how the development and implementation of OER resources might be appropriately recognized during the annual review as well as tenure and promotion process.

4. **Identify Courses With High Return on Investment**
To identify high return on investment 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. In the Fall of 2023, this survey data will be utilized to target courses and departments for potential OER discussions and incentives for greater implementation. Based on numerous discussions by the OER Committee, multiple section/multiple instructor high enrollment general education courses will be the top priority for the affordability stipend awards for Fall 2023.

To provide a better understanding of OER usage across campus, comprehensive in-depth data collection and analysis (e.g., drop/fail/withdrawal rates across disaggregated populations) will occur in conjunction with the new course marking (section attributes) scheme implemented this past Spring semester. This data and analysis will be shared with faculty across campus during the coming Fall semester.

5. **Address Common Misconceptions about OER with Instructors and Administrators**
Two "OER Basics" training opportunities were held over calendar years 2022 and 2023. These OER Basics trainings incorporated material from the Open Education Network membership provided by the Idaho State Board of Education.

ISU's Educational Technology Services (ETS) and Instructional Technology Resource Center developed a quick reference infographic to support OER development. This "getting started" reference guide provides key information with regard to searching, creating, sharing, and getting help to support OER.

6. **Encourage the Adoption of Affordability Values for Faculty and Administration**
Outcomes of OER initiatives, including data on student impacts, were widely shared through ISU's bi-weekly Idaho State Today newsletter and presented to university and faculty leadership during Spring 2023 to increase the profile of OER work on campus.

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ISU's Eli M. Oboler libraries has continued to update and expand the "Open Educational Resources: Start Here!" website. This overarching web page provides information with regard to What is OER, Find OER: Quick Start, Search Strategy, Dig Deep, Creating and Adapting OER, Using Library Resources, ISU Textbook Heroes, and ISU Pressbook Catalog. It also includes an OER information request which connects faculty directly to library support staff.

7. **Continue the Proposal-Based Program for Course Material Affordability Projects**
ISU Academic Affairs has provided funding for 10 affordability stipend awards for the completion of affordability projects for each of the past two academic years (2022/2023 and 2023/2024). 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 re-design is one of the most highly requested professional development opportunities related to OER, which made the ITRC a natural choice to administer this program.

Faculty who are selected to receive stipend awards are offered instructional design services throughout their search and implementation of OER in their courses. Upon completion of their OER project and after having taught the newly designed course at least once, they then meet with an instructional designer from the ITRC to review the process of integrating, creating, modifying, or adapting OER for their courses. This includes discussing the search process for appropriate materials and the work that was required to implement them. In addition, they discuss the impact their work has on students and what they plan to do in the future to further utilize OER in their teaching practices.

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. 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. **Offer Regular Professional Development Related To Course Material Affordability**
As stated above, 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. Moving forward, ISU will also offer 30 Minute Wednesday Webinars, focused on OER each fall.

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Lewis-Clark State College – OER / Low-Cost Course Materials Report
6.16.2023

Introduction

The following contains the 2023 update of Lewis-Clark State College's efforts surrounding the Idaho State Board of Education's *Policy III.U Instructional Materials Access and Affordability*. Much of the information below is repeated from previous years' reporting. Where applicable, updates and changes have been included.

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 have included (and still include):

- Use of available OER materials for courses

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

- Deliberate use of older editions of textbooks that are attainable at much lower cost to students

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

- Informal textbook exchange libraries hosted in the lobbies of the Nursing and Science buildings

With the advent of policy III.U, the College has expanded its efforts, particularly focused on OER / Low-cost efforts for 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.

- For 2023-24, we plan to expand our survey tracking to include all courses taught at the College.

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.).*
  - This is being accomplished through a variety of partnerships and resources. These include our campus bookstore, Library, Center for Teaching & Learning, eLearning Services, and Accessibility Services.
  - Workshops are being provided on a regular basis hosted by the CTL and/or eLearning Services.
  - 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.*
  - LC State administration and faculty have made this commitment.
  - Textbooks and materials selections are reviewed by programs and divisions each year.
  - The Provost's Office works 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.*
  - 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 eLearning 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 4 different faculty members in the statewide OPAL Fellows program (sponsored by the OSBE). OER materials have been developed for the following courses through the OPAL program:
      - ENGL 101, 102, 175
      - ECON 201, 202
      - MATH 153
    - 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.*
  - See above:
    - Regular trainings.

- GEM-TRAC mini-grants.

- OPAL Fellowship participation.

- Recognition of OER development as part of annual review and tenure/promotion portfolio processes

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

  o See above:

    - CTL & eLearning 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 101/102/175, 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 In progress

  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 2022-23 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
SOC 102	2	0	2	
SS 184	2	0	2	
SS 185	2	2	0	No cost non-OER materials assigned
ECON 201	4	0	4	OER text used along with low cost publisher-provided homework platform
ECON 202	5	0	5	OER text used along with low cost publisher provided homework platform
CITPT 108	4	4	0	
MTHPT 130	2	0	0	
MTHPT 137	6	0	0	
MTHPT 153	4	0	0	

TOTALS: **253**   70 **(27.7%)**   87 **(34.4%)**

![North Idaho College]

2022-2023 Instructional Materials Plan Report

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

As outlined by policy *III.U.*, the college has implemented the following:

- *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.).*

  - *Disability Support Services* is available for faculty consultation. 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. However, during a conversation with individuals from the College bookstore in January, there is a willingness to provide print copies of open textbooks if enough advance notice is given. Additional work is needed to define the specifics of this process.

  - The faculty who created or are creating Pressbooks OER are given guidance for creating accessible images, headings, and text by Coordinator Theresa Huff.

  - In May of 2023, NIC's first OER Pressbook *Messages That Matter* was published in the <u>NIC Pressbooks</u> site, the <u>Idaho Open Press</u> site, and in <u>OER Commons</u>. Publishing it on these hubs make the Pressbook free and open to any user in the world. NIC Pressbooks is supported and managed by Coordinator Theresa Huff. A second English Pressbook is slated for completion by August, 2023.

- *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.*

  - Starting in Fall 2022, students' learning material costs were greatly reduced due to instructor adoption and use of zero- and low-cost instructional materials:

    - BIOL-175 replaced $100+ textbook, saving students approximately $4200

    - BIOL-227, 227L, 228, and 228L replaced $100+ textbook and created an OER Lab Manual, saving students approximately $20,240

    - BUSA-234 replaced $50-100 textbook, saving students approximately $975

    - CHD-110 and 134 replaced $100+ textbook, saving students approximately $12,100

    - COMM-233 replaced $100+ textbook, saving students approximately $2400

    - ENGL-101, 102, 272, and 293 replaced $31-50 textbooks, saving students approximately $13,355

    - HIST-111 replaced $51-100 textbook, saving students approximately $4,400

    - MATH-123 replaced $133.32 course materials, saving students approximately $4,799

- MUSI-100 replaced $51-100 textbook, saving students approximately $2,200

  ➢ In Spring 2023, students' learning material costs were greatly reduced due to instructor adoption and use of zero- and low-cost instructional materials:

    - HIST-112 replaced $51-100 textbook, saving students approximately $5,400

  ➢ In Summer 2023, students' learning material costs were greatly reduced due to instructor adoption and use of zero- and low-cost instructional materials:

    - COMM-100 replaced $40 textbooks, saving students approximately $1,040

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

  ➢ An Introduction to Project Z presentation was held for all faculty November 2, hosted by eLearning and the library. The presentation covered an overview of the Project Z degree initiative, a walkthrough of the process for curating low-cost or no cost materials, adopting, adapting, or creating OER, and the related course marking and/or stipends, as well as examples of Pressbooks and their integration in Canvas. Additionally, several early adopters of low- or no-cost materials and OER shared their experience and examples with fellow faculty.

  ➢ In November, Coordinator Brian Seguin attended OLC Accelerate conference to co-present the Project-Z initiation with other Idaho OER Coordinators.

  ➢ In December, Theresa Huff, coordinated an OER lunch-and-learn for faculty that featured Dr. David Wiley and Kim Thanos of Lumen Learning.

  ➢ In January, the OER Workgroup was expanded to included OER-interested faculty. Two hybrid, monthly meetings were held in late spring 2023 in which 6-8 faculty from a variety of disciplines attended. The meetings were used to explore OER, share challenges and solutions, learn about Pressbooks and H5P, and discuss the future of OER at NIC.

  ➢ The OER Workgroup plans to become a standing committee during Fall 2023. Though no meetings were held during the summer, regular meetings will reconvene in Fall 2023.

  ➢ In February, Coordinator Theresa Huff sent out communication about upcoming OER Conferences. About 6 OER-interested faculty and staff attended the OLC virtual and in-person conference, and several more are planning to attend the OEN virtual conference in July 2023.

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

  ➢ In June of 2022, Coordinator Brian Seguin assembled an OER Workgroup comprised of eLearning Director, Thomas Scott, and Instruction Designer II, Theresa Huff. At the end of January, Theresa Huff took over the position of OER Coordinator, as Brian Seguin took a position at another institution.

  ➢ In July 2022, Coordinator Brian Seguin created graphics explaining the steps and compensation for completing STAGES 1 and 2.

  ➢ In early Fall 2022, Coordinator Brian Seguin created an OER LibGuide, housed on Springshare, with information about OER and Project Z, resources for finding, adapting, and creating OER, as well as a Literature Review spreadsheet and application forms for Project Z. As many of our librarians left or retired in Spring 2023, Coordinator Theresa Huff moved all of the information from the LibGuide to an open Canvas course and the eLearning website for ease of maintenance in February of 2023.

➢ Beyond offering guidance for individual faculty on where to find OER via email, several consultation meetings were held by the library and eLearning with individual faculty interested in adopting, adapting, or creating OER throughout the year. The purpose of the meetings ranged from support in finding subject-specific OER to specific plans of adaption or creation to training on using Pressbooks for creation.

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

➢ Throughout the year, Theresa Huff has worked with faculty who explored adopting or adapting existing texts to host via the state funded platform, Pressbooks.

➢ Starting in Fall 2022, stipend support for adopting, adapting, or creating OER has been given to faculty through the state's Project Z funds. As of June 2023, 10 instructors have received funds for adopting OER, 2 for adapting OER, and 4 for creating new OER. For those adapting or creating OER, stipends also include training in using Pressbook and H5P, if needed.

➢ Coordinator Brian Seguin created 'OER Trailblazer' graphic to honor faculty who were early adopters of OER. The Trades Division instructor, Joe Okon and his machinist group at Parker Tech created medallions with this graphic on them as awards for early adopters of OER.

➢ In March during OER Week, 11 OER Trailblazer awards were presented by the president and Dean of General Studies to early adopters of OER. They were also recognized in the NICNow, honored on NIC's OER Trailblazer webpage, and invited to be a part of the OER Roundtable event during OER Week.

- *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.*

➢ In Fall 2022, Theresa Huff created a shared doc of all GEM courses and which are utilizing 'Very Low to Zero Cost' OER materials.

➢ Thomas Scott coordinated multiple meetings between the Registrar, Senior Systems Analyst (I.T.) to talk through options for selecting and adding a '[Very Low Cost (VLC)' icon](#) to the online catalog.

➢ The OER Workgroup met with Dean of General Studies to finalize selection of VLC icon and talk through steps for identifying courses at the division level and how that information is shared. Registrar will maintain control of adding icons to individual courses and sections.

➢ A suitable VLC course marking icon was discussed and created in late 2022.

➢ In December, Coordinator Brian Seguin met with Follett Store Manager, Sheila Johnson and NIC Auxiliary Services Accountant, Steve McGroarty to discuss how we can support each other as more faculty adopt OER. Specifically, improving communications about which courses are utilizing OER. At the time, the Bookstore often received a notice of 'No Textbook' when an OER text is utilized. They expend a lot of human capital helping students identify a text.

➢ OER Workgroup met with Dean of General Studies to discuss need for formalizing a process at the division level to better identify, document, and provide enhancements (stipends or VLC icons in the catalog) for those who are utilizing zero to VLC materials.

➢ In February, Coordinator Theresa Huff had several meetings with Follett Store Manager, Sheila Johnson, NIC Auxiliary Services Accountant, Steve McGroarty, and Registrar Systems and Data Analyst, Kelly Lyons, to create a system for capturing types and cost of course materials used each semester. Additionally, communication was updated and disseminated for faculty use of Follett Discover to include "OER" and "No textbook required" options as well as deadlines for communicating choice of course materials to the bookstore.

➢ In February, all course materials for Summer 2023 and Fall 2023 courses were reviewed to prepare for course marking.

➢ The course marking system was rolled out for Summer 2023, and is in place and being utilized for Fall 2023. Students can now sort courses by "Low or No Cost Materials", and all Low or No Cost Material courses are designated with a course mark icon at the time of registration.

➢ Communication was disseminated to students and faculty about the course markings at the beginning of Summer 2023.

- *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.*

➢ Coordinator included question in STAGE 1 and 2 forms asking faculty how they would maintain the resource. Discussion with other state OER Coordinators will need to be had to determine the most efficient process for creating a process that allows for the College to measure improvement as it relates to *Policy III.N.6.b.*

➢ As of Summer 2023, NIC has identified one Z-degree Pathway: AA General Studies. By Fall 2023, we hope to have at least one more.

➢ The OER Workgroup will work this fall to create measurable goals for improving OER, to promote use of readily available and relevant OER or other low-cost materials, and to find ways to motivate divisions and individual instructors in common-indexed courses to adopt OER.

CONCLUSION

Since June of 2022 the College has had three separate individuals serving in the role of Interim Provost. It will be critical for the most recently appointed Provost to support this initiative by trusting those who have worked to build processes and develop materials. Understanding the process and quickly processing stipends for those supporting this initiative will be key. Continuing to grow the OER Workgroup into a standing committee which includes faculty, staff, and students will improve understanding of, access to, and adoption of Open Education Resources.

Open Campus Committee Report to the State Board of Education on Implementation of Policy III.U – Instructional Material Access and Affordability

Submitted June 16, 2023

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The University of Idaho's (UI's) Open Campus Committee (OCC) submits this report to update the State Board of Education (SBOE) on UI's progress toward implementing a plan to increase access and affordability of instructional materials for all students, per SBOE Policy III.U – Instructional Material Access and Affordability. The OCC has begun to implement the university's institutional plan for III.U submitted in 2022. That plan remains in place, and this report describes implementation to date. It focuses first on UI's progress on broad III.U strategies to increase access and affordability of instructional materials for all students. Then, it describes UI's course marking initiative (SBOE III.U.2.a.iv).

Updates on Specific Strategies to Increase Access and Affordability of Instructional Materials for All Students (III.U)

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.).

The University of Idaho has several units that provide intersecting support for faculty to ensure all instructional materials are relevant and accessible for all students. The Center for Excellence in Teaching and Learning (CETL) provides instructional design support for faculty in making Canvas content accessible to students, while the Center for Disability Action and Resources (CDAR) liaises between students and faculty to provide accessible course materials for students with formal disability accommodations. More broadly, the Library processes all library course reserve items with optical character recognition software to ensure that all course reserve materials can be read with screen readers.

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ii. Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic Idaho State Board of Education 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 University of Idaho has several strategies for minimizing the cost of instructional materials for students while maintaining the quality of education, intellectual freedom, and faculty textbook expertise. All faculty can use the Library's digital course reserves software, Leganto, to provide copyright-compliant, zero cost pathways for students, even in courses that use high-cost, for-profit materials. The Library also provides a Student-Driven Course Reserves initiative that allows students to request library copies of popular textbooks, alleviating the burden for high-cost courses. The course marking project described below is also anticipated to incentivize and support faculty members in exploring high-quality alternatives to high-cost course materials.

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

The University of Idaho Library has several development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials. The Library's Think Open fellowships, which are intensive faculty collaborations that create new OER or adapt existing OER to create zero cost courses. Since its inception in 2017, the Think Open program has saved students over $500,000 in textbook costs. The Library has also partnered with CETL to deliver faculty workshops promoting the use of affordable course materials through Leganto, and the Library and CETL are collaborating to deliver OER professional development during new faculty orientation and in Canvas faculty dashboards.

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

The University of Idaho Library offers several strategies to support faculty adoption, adaptation, and/or use of OER and other affordable instructional materials. The Think Open program supports up to six faculty members per year through intensive collaborations to create, adapt, or adopt OER or otherwise transition their course materials to zero cost. Currently the Library is brainstorming how future revisions to the Think Open program might impact more faculty. The Library hosts digital course reserves through Leganto, which provides zero cost course materials even for high-cost courses, and provides outreach and instruction to faculty to increase engagement with the program. In Spring 2023, the Open Campus Committee surveyed students and faculty about their awareness of and barriers to accessing and adopting affordable course materials; these results will be used to inform future strategies for outreach, information, and incentives.

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

The University of Idaho Library has several programs to encourage and support faculty in publicly sharing OER developed for their courses. The Library led the development of the Network of Idaho Academic Libraries (NIAL), a state-wide initiative to facilitate collaboration; current initiatives of NIAL include an OER Commons repository with textbooks faceted by GEM courses and an OER Standing Group. The Library also supports Pressbooks, which allows faculty to easily publish, clone, and share their OER to the global Pressbooks catalog for broad discoverability and reuse. The Center for Excellence in Teaching and Learning has an existing Faculty Spotlight series that could be used to promote faculty who develop OER for their own courses.

The formation of the OCC itself represents significant progress in UI's access and affordability efforts. In Spring 2023 the University of Idaho Library and the Office of Academic Initiatives convened a coalition of campus units, the Open Campus Committee. Led by the Library, the OCC leverages campus experts in the Registrar's Office, the Center for Excellence in Teaching and Learning, the VandalStore, and Student Advising, using a collaborative approach to create holistic solutions to lower student course materials costs for students and create additional opportunities for faculty development and adoption of OER. The formation of this committee itself represents a major progress point for Open activity on the UI campus, as this is the first time there have been sustained conversations amongst Open stakeholders on campus.

The OCC has two charges for 2023-2024: to investigate and implement a zero and low-cost course marking system, and further develop and promote a culture of awareness and adoption around instructional material availability and affordability.

vi. - viii: 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; 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; 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.

Work is underway to mark zero and very low-cost courses (see below), due Fall 2024, including for GEM and other common-indexed courses. Conversations around inclusive access courses, automatic charges, and access codes for instructional materials are in progress. The OCC initially considered implementing in Spring 2024 but determined that a well-designed communications campaign would substantially increase participation and required additional time. The committee developed the plan and timeline below to incorporate such a communications campaign and so promote stronger initial engagement and long-term impact.

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Course Marking Implementation Overview[1]

Based on our work to date, the OCC believes opt-in course marking of zero and low-cost courses will debut at the University of Idaho for the Fall 2024 course schedule.

- Spring and Summer 2023
    - Open Campus Committee (OCC) met, and continues to meet, regularly to develop, plan, and implement course marking capacity within technological systems and course scheduler workflow
        - Specific tasks assigned to develop instructions and guidance for course schedulers, instructions and resources for instructors, and outreach and marketing campaigns
        - Registrar configures course registration system to allow course marking for low- or zero- cost course materials costs
        - Student Advising, supported by Library, leads campus-wide OER survey of students and faculty, with 1,112 respondents
    - Library conducts data analysis identifying high-cost, high-enrollment courses, using Bookstore data, to target future OER collaboration.
    - Library develops workshops and tutorials geared towards faculty who will be seeking information on how to create zero or low-cost courses in the Fall.

- Fall 2023
    - Introduce course marking to campus at large; outreach to faculty begins
    - Introduce course marking to Faculty Senate and other relevant stakeholders for review and approval of policies and procedures
    - Procedures and supporting instruction materials are finalized for Course Schedulers
    - Library develops student-facing materials on how to use and understand course marking

- Spring 2024
    - Faculty submit zero and low-cost designations for Fall '24 alongside typical course scheduling activity
    - Campus outreach focused at students on how to use upcoming change begins

- Fall 2024
    - Zero and low-cost courses launched in the course catalog, available to students

Appendix A: Preliminary Survey Results

This survey was distributed to all undergraduate and graduate students and faculty in April 2023. Respondents who completed the survey totaled 1,112. Preliminary results show that there is high student

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[1] III.U.2.a.iv: 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.

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desire for affordable course materials, and faculty interest in developing OER despite barriers to adoption including limited time and knowledge.

Student Retention and Advising has been instrumental in leading survey development and data analysis, providing valuable insights and perspectives. They have also shared their experienced anecdotal information on how students and advisors currently estimate costs, offering valuable context to the work of the OCC. Student Retention and Advising's contributions are vital in understanding student perspectives and informing decision-making regarding course materials costs.

Data Snapshot

Undergraduate participants (n = 704)
- 60% reported experiencing challenges in affording living expenses while at UI
- 47% reported not purchasing a required course material because they could not afford it
- 86% reported purchasing a required course material for a class and not using it
- Top reported ways students have tried to reduce course material costs
  - 72% bought a course material from a source other than the campus bookstore because it was more expensive at the campus bookstore
  - 66% have rented a digital version of a course material
  - 61% have bought a used copy of a course material from the campus bookstore
  - 46% have shared a course material with a classmate
  - 32% have rented a printed course material
  - 31% have illegally downloaded a course material online
  - 30% have rented only the digital course material chapter(s) needed for a course

    "I have found that the courses that have required textbooks that can only be purchased through the VandalStore are more expensive (upwards of $250+) and we typically only read a few chapters out of or complete very few exercises provided in the workbook. I have gone out of my way going through each year of college to find required textbooks through renting websites or amazon to avoid the cost of textbooks on top of tuition, living expenses, and extra". -Undergraduate student

Graduate participants (n = 243)
- 45% reported experiencing challenges in affording living expenses while at UI
- 38% reported not purchasing a required course material because they could not afford it
- 58% reported purchasing a required course material for a class and not using it
- Top reported ways students have tried to reduce course material costs
  - 67% bought a course material from a source other than the campus bookstore because it was more expensive at the campus bookstore
  - 47% rented a digital version of a course material
  - 41% bought a used copy of a course material from the campus bookstore
  - 31% rented a printed course material
  - 30% shared a course material with a classmate
  - 27% have illegally downloaded a course material online

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○ 23% have used a reserve copy of a course material from the campus library

Teaching assistants (*n* = 49)
- ○ 20 TAs reported using OERs in their current classrooms
- ○ 37 TAs reported interest in using OERs in a future classroom

"Textbooks (as a harshly general term) are something that many professors deeply expect you to acquire, regardless of your ability to fund, or even of the material's actual necessity. I have no family to rely on for extra funds, I have no way to thoroughly save money with my stipend hardly being able to cover rent, so I am not above a safety net like my peers and colleagues. I have had discussions with many professors - both in undergrad and graduate - about alternative ways to fund my need for certain materials. Many are understanding, but there are occasional professors who feel that - despite full awareness of differing economic standards between generations - I must purchase any and all materials and equipment, because otherwise I must ask myself, "am I really dedicated to this career and way of life?" -Graduate student

Teaching faculty participants (*n* = 165)
- ■ Self-reported average cost of course materials per class

Average cost of course materials per class	*n*
$0-30	57
$31-50	21
$51-100	41
more than $100	38
I'm unsure of the current approximate average cost of course materials for my courses (per course)	8

- ■ Factors considered when choosing course materials

Factors	Not important	Somewhat important	Somewhat important	Very important
Educational quality	1	0	12	188
Prior use	34	36	104	26
Cost to the student	2	5	67	125
Access to instructional resources	64	29	57	50

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Format flexibility	27	48	76	49
Standardization with materials adopted by the other sections of the course	73	38	45	41

- Current course material affordability actions in use

Affordability actions	*n*
Using free or open course materials (books/textbooks)	92
Creating new free or open course materials (books/textbooks) for use in your course(s)	56
Using other solutions to reduce the cost of course materials (books/textbooks), such as library e-resources	101
Not currently using any OER or course material (book/textbook) affordability actions	42

- Interest in future course material affordability actions

Affordability actions	*n*
Creating new free or open course materials (books/textbooks) for use in course(s)	58
Updating a course to use existing free or open course materials (books/textbooks)	105
Updating a course to use other solutions to reduce the cost of course materials (books/textbooks), such as library e-resources	103
I am not interested in creating or adopting free or open course materials	29

- Preferred incentives to incorporate OER or course material affordability actions

Incentives	Very unlikely	Somewhat unlikely	Somewhat likely	Very likely

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Course release	33	30	63	50
Stipend	29	31	59	62
Graduate student support (assistance updating course)	33	36	73	37
OER professional development funding	29	38	71	42
ITRC/Instructional designer support	30	48	73	29
OER consultant (knowledgeable faculty member support)	32	51	66	31
Knowledge that my development efforts would be considered substantially meaningful in annual evaluations	27	37	63	54
Knowledge that my development efforts would be considered substantially meaningful in meaningful in promotion and tenure and five-year reviews	46	24	59	52
Working with others in my department/college to create or adopt OER	30	49	70	32

- ■ Greatest barrier to incorporate OER or course materials (book/textbook) affordability actions
  - ● Time to incorporate OER or course material (book/textbook) affordability actions into courses

"In the past year I have changed all of my textbooks to inclusive access which has greatly reduced the costs for students. Revising all of my courses (8 total) and ensuring the OER materials meet our accreditation standards would be a huge undertaking." -Teaching faculty member

"I would love to turn my course notes and materials into OER. The two things that would be most helpful for encouraging this would be: 1) some help or support in devising a plan of action (how should I proceed? Where--what archive--should they be published? What kind of license--CC or...??--should I use? etc.). 2) Some assurance that the development of OER will be valued at a level consistent with the amount of work

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involved by the university administration, my department chair, the Dean, etc." -
Teaching faculty member

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SUBJECT

Strategic Plan and Performance Measures Revision Recommendations

REFERENCE

February 2023	Board approved the 2023-2027 Strategic Plan.
April 2023	Board approved first reading of Board governed institution and agency strategic plans.
June 2023	Board approved final institution and agency 2023-2027 strategic plans.
August 2023	Board received Performance Measure Outcomes reports for the Board's 2022-2026 K-20 strategic plan and for all Board governed institution and agency 2022-2026 strategic plans.
August 2023	Board received AOC Committee Report.
October 2023	Board received Performance Measure and Systemwide Performance Measure Reports.

BACKGROUND/DISCUSSION

Idaho State Constitution, Article IX, Section 2, provides that the general supervision of the state educational institutions and public school system of the State of Idaho, "shall be vested in a state board of education, the membership, powers and duties of which shall be prescribed by law." Through obligations set in the State Constitution and Idaho statutes, the State Board of Education (Board) is charged with the general supervision, governance and control of all educational institutions and agencies supported in whole or in part by the state. This includes public schools, colleges and universities, the Department of Education, the Division of Career Technical Education, Idaho Public Television, the Division of Vocational Rehabilitation, and the Public Charter School Commission. The Board and its executive agencies are charged with enforcing and implementing the education laws of the state.

Due to these broad responsibilities, the Board serves multiple roles. The Board sits as a policy-making body for public education in Idaho, provides general oversight and governance for public K-20 education, and has a direct governance role as the Board of Regents for the University of Idaho and the board of trustees for the other public four-year college and universities. The K-20 Education strategic plan must encompass and serve all these aspects of Idaho's public education system.

Idaho Code § 67-2903 sets out minimum planning elements that are required to be in every agency and institution strategic plan as well as the annual review and updating requirement that is the basis for the Board's strategic planning cycle.

The strategic planning process is a year-long cycle. In February the Board approves any updates or revisions to its five-year strategic plan. In April, institutions and agencies governed by the Board submit drafts of their strategic plans for review. In June all plans are finalized and submitted to the Division of Financial Management along with budget requests for the next fiscal year.

In August, the Board begins reviewing data and information to help inform continuous improvement. This includes reviewing performance measure outcome reports and engaging in a work session to review recommendations from the Accountability Oversight Committee. In October, the Board engages in a second work session to review performance measure outcomes based on the K-20 strategic plan.

In December of each year, the Board considers recommendations for strategic plan revisions in preparation for a February final approval.

IMPACT

Based on Board discussion in December, proposed revisions will be finalized and brought back for final consideration in February. The Board's strategic plan must be approved in February as agencies and institutions governed by the Board are required to submit drafts of their strategic plan updates for Board review in April. Institution and agency plans must be aligned to the Board's plan.

ATTACHMENTS

Attachment 1 – Proposed Revisions - Notes and Slide Deck

BOARD ACTION

This item is for information only.

Strategic Plan & Performance Measure Recommendations

Strategic Plan & Performance Measures

Mission Statement

What the agency does, why it does it, and for whom it does it

Vision Statement

An inspiring picture of a preferred future

Goal

A statement of desired results for an organization or activity

Objective

Time-based statement of intent for a person/team within the agency

Task

Time-based action to be taken by a person/team within the agency

Performance Measure

A quantitative tool to measure effectiveness, efficiency, or outcomes

Performance Target/ Benchmark

The desired performance level for each measure

Performance Result

The actual performance level for each measure

Evaluation and Feedback

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Timeline

- ## Feb – Board Plan Approved
  - March - Agencies/Institutions draft own plans

- ## April- Board provides feedback on Agency/Institution plan drafts.
  - May - Agencies/Institutions finalize plans.

- ## June – Agency/Institution Plans Approved
  - July Plan (next term) submitted to DFM
  - August -Sept - results reported to OSBE and DFM

- ## October – Results Report to Board
  - Nov - January - consideration of adjustments to Board Plan

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Reports

1. **Strategic Plans to DFM**   Plans due to DFM July 7

2. **Performance Report to DFM**   Outcomes due to DFM Sept 1

    - Limited to 10 measures; % based outcomes.
    – Must include at least one measure per objective

3. **Systemwide Measures Report**   Board Policy I.M (3.a)

    – 8 measures, subset of #2
    – Board requires institutions to include

4. **Performance Measures Report**   Due to Board October

    – Currently 33 measures
    – 115 reported calculations

Strategic Plan: Mission/Vision

MISSION

To drive improvement of the K-20 education system for the citizens of Idaho, focusing on quality, results, and accountability.

VISION

A student-centered education system that creates opportunities for all Idahoans to improve their quality of life.

An Idaho Education: High Potential – High Achievement

Strategic Plan: Goals

- Goal 1: Educational System Alignment

- Goal 2: Educational Readiness

- Goal 3: Educational Attainment

- Goal 4: Workforce Readiness

Strategic Plan: Objectives

- Goal 1: Educational System Alignment
    - Objective A: Data Access and Transparency
    - Objective B: Alignment and Coordination

- Goal 2: Educational Readiness
    - Objective A: Rigorous Education
    - Objective B: School Readiness

- Goal 3: Educational Attainment
    - Objective A: Higher Level of Educational Attainment
    - Objective B: Timely Degree Completion
    - Objective C: Access

- Goal 4: Workforce Readiness
    - Objective B: Workforce Alignment

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Goal 1: Educational System Alignment

- Objective A: Data Access and Transparency
  - Task: Develop a single K-20 data dashboard by end of ~~FY24~~ FY25
    - ISEE Modernization Update to Committee?

  - Measure 1:

  Note: must have one measure for every objective.

Goal 1: Educational System Alignment

- Objective B: Alignment and Coordination
  - Task: Comprehensive review of dual credit. (in progress under IRSA)

  - Measure 1: Percent of postsecondary community college transfers who graduate from four-year institutions.
    - benchmark 25% ; FY23 results 14-17%

  - Measure 2: Percent of high school students who graduate high school with an associate degree
    - Benchmark ~~3% 4%~~ ;3.75%

Goal 2: Educational Readiness

- Objective A: ~~Rigorous Education~~
  Improve Literacy Performance Outcomes

- Objective B: ~~School Readiness~~
  Improve Mathematics Performance Outcomes

- Objective C: Improve High School Graduation Rates

Goal 2: Educational Readiness

- Objective A: Improve Literacy Performance Outcomes
  - Task: science of reading professional development initiative

  - ~~Measure 1: IRI Fall Proficiency~~

  - Measure ~~2~~ 1: IRI Spring Proficiency
    - Benchmark 70%

  - Measure 2: IRI Growth - change in proficiency fall to spring
  - Benchmark: New Measure FY25
    - Note: benchmark TBD; must be % based increase fall to spring

Goal 2: Educational Readiness

- Objective B: Improve Mathematics Performance Outcomes
  - <u>Task: Develop math pathways</u>

  - Measure 1: % proficient on ~~ELA,~~ Math~~, and Science~~ ISAT.

  - <u>Measure 2: Math growth -</u>
    - <mark>movement upward in performance category? (basic to proficient; proficient to advanced, etc.).</mark>

Goal 2: Educational Readiness

- Objective C: Improve High School Graduation Rates
  - <u>Task: Review Graduation Requirements</u>

  - Measure 1: 4 Year ACGR
  - <u>Measure 2: 5 Year ACGR</u>

Goal 3: Educational Attainment

- Objective A: Higher Level of Educational Attainment
  - Task: many in progress – choose one?

  - Measure 1: # of Certificates/Degrees Conferred

  - Measure 2: % returning for second year. (freshman attrition)

  - Measure 3: % completing within 150% of expectation
    (Move to timely completion)

Goal 3: Educational Attainment

- Objective B: Timely Degree Completion

  – Measure 1: Adequate Yearly Progress Toward Completion (30 or 18 credits)

    <mark>Note: phrasing of the measure needs to be adjusted to work for 2 and 4 year institutions. May need to differentiate benchmarks based on previous year data?</mark>

  – ~~Measure 2: Median number of credits earned at completion of associate degree*~~

  – Measure 2: % completing within ~~150~~ 100% of expectation

Goal 3: Educational Attainment

- Objective C: Access
    - Measure 1: proportion of postsecondary graduates with student loan debt.
    - Measure 2: % of students who complete the FAFSA
    - Measure 3: Percent cost of attendance to student
    - Measure 4: average net price differential in $ at 4 and 2 year institutions
    - Measure 5: Expense per student

Note: consider pulling 1-5 out of strategic plan, and reporting separately in a college affordability report and refocusing strat plan on measures within our control.

Consider things more within our control. . .
- Next Steps
- Opportunity Scholarship
- Launch
- Tuition Rates

Goal 4: Workforce Readiness

- Objective A: Workforce Alignment
  - Task: ~~Increase in secondary CTE programs and postsecondary programs tied to workforce needs per year.~~

  - Measure 1: percent of high school students participating in apprenticeships.~~ and postsecondary students participating in internships.~~
    - FY23 "new measure" will need a benchmark.

  - Measure 2: % of total degrees awarded in STEM fields (paraphrased)
    - Benchmark: 50%

  - Measure 3: - moved to task.

Proposed Strat Plan Measures

1. Alignment - Data Transparency/Access <mark>TBD.</mark>
2. Alignment – 2-yr to 4-yr Institution Grads
3. Alignment – HS Grads with AA Degrees

4. Readiness - Literacy Spring Proficiency
5. Readiness - Literacy Growth
6. Readiness - Math Proficiency
7. Readiness - Math Growth
8. Readiness - Graduation Rate 4yr ACGR
9. Readiness - Graduation Rate 5 yr ACGR

10. Attainment - Degrees/Certificate Completion
11. Attainment – Freshman Attrition
12. Attainment – Adequate Yearly Progress
13. Attainment – Completion w/in 150% of time
14. Attainment – College/Career Readiness <mark>TBD</mark>
15. Attainment – College/Career Readiness <mark>TBD</mark>

16. Workforce – STEM Degree Completion
17. Workforce - <mark>TBD</mark>

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Proposed Top Ten Measures

1. Alignment – Data System <mark>TBD.</mark>
2. Alignment – HS Grads with AA Degrees
3. Readiness – Literacy Spring Proficiency
4. Readiness – Literacy Growth
5. Readiness – Math Proficiency
6. Readiness – Graduation Rate
7. Attainment - Degrees/Certificate Completion
8. Attainment – Completion w/in 150% of time
9. Attainment – College/Career Readiness <mark>TBD</mark>
10. Workforce – STEM Degree Completion