In 2019, the Oregon State Legislature passed House Bill 2213 (HB2213), which requires each public institution of higher education to create a textbook affordability plan. At the time of this report, two institutions have completed plans and all others are in the process. This report provides an update on the textbook affordability plan progress at each of Oregon's public universities.

Eastern Oregon University

A textbook affordability committee has been formed and is meeting to address the charge of developing a textbook affordability plan. The timeline is to have a completed draft by the end of February 2021 and have this draft reviewed via Colleges and relevant shared governance committees by the end of June 2021.

Committee membership:
Karen Clay (Committee Chair)
Cora Beach (Business Officer and Bookstore Contract Manager)
David Bentz (Senior Instructional Designer)
Michael Fields (Faculty representative)
Julia Luty (Student Representative)
Lynn Paulson (Head of the Campus Bookstore)

Oregon Institute of Technology
Oregon Institute of Technology has developed a textbook affordability plan that is available in the appendix.

Committee membership:
Sharon Beaudry, Associate Professor, Business
Jolyn Dahlvig, Associate Dean of Students, Portland Metro Campus
Andria Fultz, Associate Professor, Communication
Ben Kintner, Registrar's office
Dawn Lowe-Wincentsen, Professor, Portland Metro Campus Library Director
Stephen Metsig, Student, Portland Metro Campus, Class of 2020, ASOIT-PM Officer 2019-2020
Marci Miller, University Book store manager
Zachary Pare, Student, Klamath Falls, Class of 2020
Terri Torres, Professor, Mathematics, and Faculty Senate President 2019-2020
Alan Wallace, Information Technology Services

Oregon State University
OSU has developed a textbook affordability plan that is available in the appendix.

Committee Membership:
Stefanie Buck –Director, Open Educational Resources, Ecampus –Chair
Haili Barrios –ASOSU Chief of Staff/Undergraduate Student
Marjorie Coffey –Coordinator, Academic Support Initiatives, Academic Success Center
Jacob Dilla –ASOSU Graduate Affairs/Graduate Student
Beth Filar-Williams –Library Experience & Access Department Head, University Libraries
David Goodrum –Director, Academic Technology
Lynn Greenough –Associate Director, Learning Platform Services
Nicole Hindes –Assistant Director, Human Services Resource Center
James Howard –Academic Materials Manager, OSU Beaver Store
Mike Jefferis –Associate Registrar, Catalog, Curriculum & Scheduling
Sarah Fay Philips –Learning Lab Librarian, Student Success Center, OSU-Cascades
Shannon Riggs –Executive Director, Course Development & Learning Innovation, Ecampus
Lily Sheehan –Associate Professor, English and Women, Gender, Sexuality Studies

Portland State University
PSU has not yet completed a textbook affordability plan. Below is an update on where the current plan to complete a textbook affordability plan:

September 2020: Textbook Materials Affordability Subgroup charge was approved
October - November 2020: We are currently recruiting members for the committee
January 2021: Official kick off of subgroup - first meeting scheduled
Spring 2021: Have a draft version of textbook affordability plan completed
late Spring /Summer 2021: Finalize the plan

Southern Oregon University
Southern Oregon University Textbook Affordability Plan has been hampered by the departure of the point person in December 2018. In August interim duties were assumed but without guidance other than through Open Oregon Educational Resources (OER) coordinator. The Interim University Librarian recently met with the OER coordinator to help serve as a stop-gap measure until the Open Access & Government Information Librarian position is filled. The search was opened on 12/10/2020. SOU hopes to have someone in the position by April 1, 2021. Currently several faculty participate in the recent Virtual OER Review Workshop which offers faculty an opportunity to adopt an OER textbook for a course, review the OER, and receive a stipend for completing the review.

In addition, Southern has submitted an Open Oregon Educational Resources Open Social Services Pathways for Criminal Justice and Human Development/Family Studies proposal to the U.S. Department of Education. Open Social Services Pathways is a statewide project designed to bring together a consortium to develop open educational resources including textbooks and ancillary materials with an equity, diversity, and inclusion lens for 4 Criminal Justice and 5 Human Development/Family Studies courses.

As part of Southern Oregon University's commitment to the success of this project, SOU will:
- •Support grant project through recognition and publicity of faculty work;
- •Invoice for funds in a timely manner;
- •Assign Authoring Faculty to teach relevant courses in order to implement OER materials; and
- •Collect data, as requested, to measure impact of OER implementation.

This work is facilitated by the existing relationship between Oregon's statewide OER program and SOU's Interim University Librarian, our institution's designated OER point persons who liaise between administrators, faculty, staff, and Open Oregon Educational Resources.

University of Oregon

The Textbook Affordability Task Force was convened beginning in Fall 2020 term with the support of the Office of the Provost. The task force is working on creating a faculty survey to better understand faculty priorities for selection of course materials, as well as current awareness and perceptions of OER at the University of Oregon. This survey data will help inform the design of the Textbook Affordability Strategic Plan. The Task Force hopes to complete the initial strategic plan in late Winter 2021 term to present to University Senate and Academic Council during Spring 2021 term.

Textbook Affordability Task Force Membership:
Robin Clement, (Co-Chair) Director, Master of Accounting Program, Senior Lecturer II
Rayne Vieger, (Co-Chair) eLearning & OER Librarian
Ron Bramhall, (Sponsor) Associate Vice Provost, Academic Excellence
Nick Keough, ASUO Senate, Undergraduate Student
Alex Lyons, Chief Information Officer, The Duck Store
Mike Urbancic, Senior Instructor I
Sarah Strickler, Assistant Registrar for Operations

Western Oregon University

Western Oregon University's Textbook Affordability Committee continues work on the Textbook Affordability Plan. The Committee intends to enact the plan during for the 2021-22 academic year.

Textbook Affordability Committee Membership:
Chelle Batchelor, Library, Library Dean
Erin Baumgartener, Provost's Office, General Education Director
Amy Clark, Registrar's Office, University Registrar
Sarah Crockett, Bookstore, Interim Bookstore Manager
Patty Flatt, Chemistry/WOU Foundation, Faculty Member/Board Member
Rian Gayle, Disability Services, Accommodations Coordinator
Sue Kunda (Chair), Library, Scholarly Communication Librarian
Elisa Maroney, Deaf Studies & Professional Studies, Faculty Member
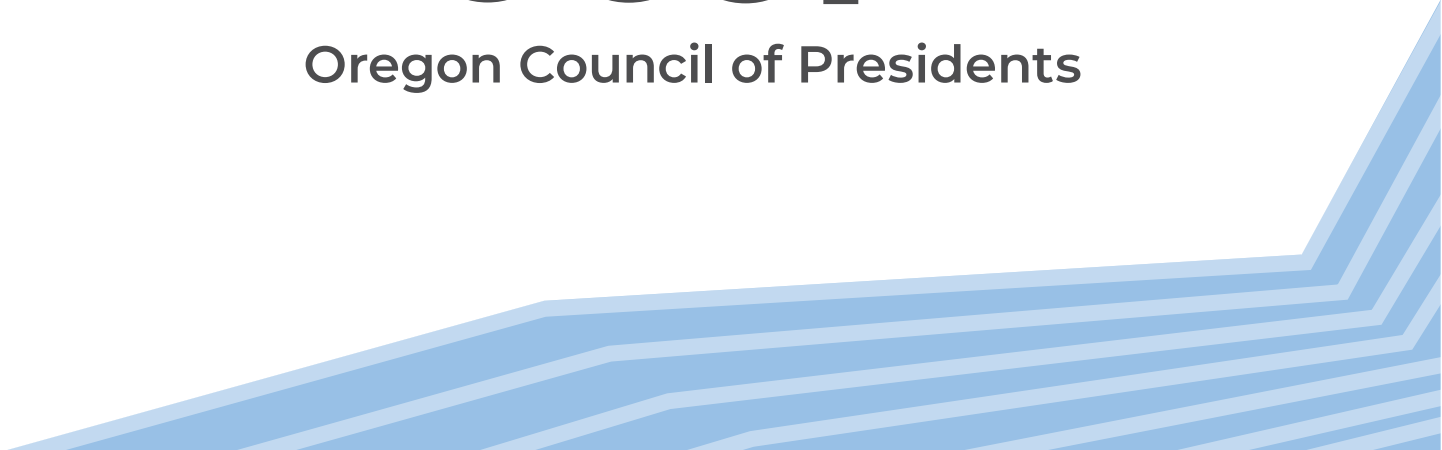Leanne Merrill, Mathematics, Faculty Member
Adam Schaeffer, MS Educational Technology, Graduate Student
Seyed Shahrokni, Academic Innovation, Instructional Designer

Appendix

OCOP

Oregon Council of Presidents

Oregon State University Affordable Learning Plan

Prepared by the Provost's Affordable Learning Steering Committee

In 2019, the Oregon State Legislature passed [House Bill 2213](#) (HB2213), which requires each public institution to create a textbook affordability plan. In fall term 2019, the provost convened the Affordable Learning Steering Committee (ALSC) with the charge to develop the processes for Oregon State University comply with the new state law, to help fulfill OSU's access mission by improving the affordability of course materials, and to positively impact student success by making it more affordable for students to obtain course materials they need to study at the start of each term.

In compliance with HB 2213, Oregon State adopts and implements the Affordable Learning Plan outlined in this document. Oregon State's Affordable Learning Plan (OSUALP) affirms our commitment to improving access and making higher education more affordable by reducing the costs of textbooks and required course materials. The goal of this plan is to increase the adoption of low- and no-cost course materials so that OSU students will see a steady reduction in the amount they spend on textbooks or course materials.

Oregon State's Affordable Learning Plan has four pillars: Institution-Wide Goals, Engaged Faculty, Informed Students, and Sustainability.

HB 2213 Requirements1

All Oregon public institutions must create an affordable learning plan that addresses the following:

- Contain measurable goals to increase textbook affordability.
- Address how to mitigate the economic impact of decreased academic bookstore revenue as a result of the increased adoption of low- or no-cost open educational resources.
- Set forth the steps OSU will take to advertise the availability of academic courses designated as using low- or no-cost course materials.
- Contain a statement of support of academic freedom.
- Establish a process for faculty and instructors to be informed about available low- and no-cost course materials.

Pillar 1: Institution

*Collaboratively establish, work toward, and report on the achievement of **measurable institution-wide goals** that improve the affordability of course learning materials and therefore access to an OSU education.*

1.1 Oregon State will be transparent regarding the cost of textbooks and other required course-related costs at the time of registration.

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[1] As laid out in Section 2 of HB 2213

1.1.1 Oregon State faculty will report all required course materials, including items such as clickers, lab kits, software, proctoring fees or other items students must purchase by using the course materials reporting process through the Beaver Store requisition form.

1.1.2 To make savings calculations transparent, Oregon State will adopt and publish a clear and transparent formula for calculating savings/cost avoidance

1.1.3 Each college will set a goal for a certain threshold of courses use low- and no-cost course materials. *For example, 25% of the courses offered by the College of Agriculture will use low- or no-cost course materials by fall term, 2023*.

1.2 Oregon State will regularly gather data from faculty and students through surveys about use, satisfaction, and quality of affordable learning materials; student learning; and cost savings.

1.3 The ASLC will report semi-annually to the Oregon State community and to the Higher Education Coordinating Committee (HECC) progress toward institution-wide goals.

1.4 Oregon State will track and share publicly with the Oregon State community data and metrics that contribute to the affordability of course materials, such as the following: the numbers of open educational resources adopted, adapted, and authored; numbers of faculty and students engaged with or impacted by low- and no-cost course materials; faculty and student satisfaction with low- and no-cost course materials; student success rates related to low- and no-cost course materials; Human Services Resource Center (HRSC) and library course materials usage data; economic impact on the OSU Beaver Store, and totals of course sections with first day access to course materials.

Pillar 2: Engaged Faculty

*Provide **support for faculty** to adapt, create, and share affordable course learning materials when appropriate in keeping with the institution's land grant mission.*

2.1 Oregon State will increase the number of instructional faculty members reporting course materials through the Beaver Store process and will reach the 100% threshold for course section reporting by 2025.

2.2 Each college and administrative faculty or student support unit will designate an Affordable Learning liaison who will help to connect instructional faculty and students to low- and no-cost course material resources, such as those available from the OSU OER Unit, Beaver Store, and Library.

2.2.1 Affordable Learning liaisons will meet quarterly for professional development and support for the duration of the 3-year plan. After that, the strategy will be reviewed.

2.3 Oregon State's OERU and Beaver Store will create and maintain an online guide that assists faculty in reporting course materials through the Beaver Store process.

2.4 The ALSC will do outreach to colleges, support units, and other Oregon State community members on a periodic basis, such as presentations at faculty meetings, Faculty Senate, email messages distributed through Inform lists, and information shared via institutional media outlets.

2.5 Oregon State will recognize faculty and department efforts in implementing low or no-cost learning materials in their courses through a variety of mean, including awards and stipends.

2.6 Oregon State will update its current intellectual property policy to reflect copyright-ownership by faculty of instructional materials in order to promote the adaptation of existing and authorship of new OER by Oregon State faculty.

2.7 Oregon State will adopt a statement of support of academic freedom in relation to the selection of appropriate course materials.

Suggested wording:

> *Oregon State University affirms the AAUP's statement of academic freedom. Faculty, including instructors, have the right to teach and address controversial issues relevant to the subject matter of the course they teach and educational activities they conduct. As part of academic freedom, faculty have the right to choose instructional materials and content, subject to faculty and academic units' oversight of curriculum and instructional materials, university policy, state law, and federal law.*
>
> *Efforts to make affordable learning materials available to students should not abridge the right for faculty to select high-quality, inclusive course materials for the classes they teach. In addition, efforts to make affordable learning materials available to students should respect the rights of faculty and instructors to their own intellectual property, including course materials that they create.*

Pillar 3: Informed Students

*Communicate the availability of courses designated as low- or no-cost in a timely manner to **inform students** and enable sound financial decisions that affect their health and well-being.*

3.1 Oregon State will improve the visibility of low and no-cost course materials sections in application or resources anywhere students can access course schedule information.

3.2 The ALSC will communicate the availability of low- and no-cost sections through student channels such as ASOSU, Advising, Valley Library, and HSRC, among others.

3.3 See also 1.1 and 1.1.1

Pillar 4: Sustainability

*Review and revise the Affordable Learning Plan on a regular basis as technologies, resources, and economic conditions change to ensure **sustained progress.***

4.1 Oregon State will re-evaluate, assess, and, if needed, adjust this plan as technologies, resources, legislation, and economic conditions change. The ALSC will review and update Oregon State's affordable learning plan every four years, in coordination with biannual HECC reporting requirements.

4.2 Oregon State will communicate and affirm that the OSU Beaver Store is the preferred choice for distributing course content.

4.3 To mitigate the impact of the Affordable Learning Plan on the OSU Beaver Store, Oregon State will investigate the adoption of tools and procedures that center the Beaver Store as the resources for locating and acquiring course materials.

4.4 Oregon State will provide continuing education/professional development for faculty to promote and support the development and adoption of open educational resources.

4.5 Oregon State will encourage and offer suggestions to departments on how to address the role of open educational resources (OER) in their tenure and promotion requirements including how OER are evaluated in the tenure and promotion process and appropriate wording for promotion and tenure documents.

Textbook Affordability Plan 2021-2025

In Accordance with Oregon House Bill 2213 The following Textbook affordability plan has been created for the Oregon Institute of Technology community and the Higher Education Coordinating Commission (HECC).

Goals

1. *Adjust the institutional culture of text adoption and syllabus publishing to make materials available in order to inform student curriculum choices and planning.*
   a. Work with the bookstore and registrar to develop a way to request textbooks further in advance.
   b. By 2023 publish sample syllabi in 50% of classes for students to access at registration.

2. *Generate $2 million in student course materials savings by 2025.*
   a. Each quarter the library will provide updated savings numbers from the Library OER incentives program.
   b. $1 million in student savings will be reached by Spring 2022.
   c. The bookstore will notify instructors that if an OER Resource would like to be adopted, they can get a printed copy in for students at a low cost to students. The bookstore will also post when a textbook is an OER Resource. The sign will state: This is an OER Textbook, Low Cost/No Cost options may be available in digital format.

3. *Develop a toolkit for textbook adoption and changing textbooks accessible to all faculty.*
   a. The library OER incentives program will develop and implement a long-term plan by Spring 2021.
   b. Resources will be posted for faculty by Fall 2021 with updating schedule of development opportunities each quarter after*.*

4. *Provide professional development and faculty support in affordable and open text options.*
   a. Access to an asynchronous course on open education and OER will be available to faculty by Winter 2021.
   b. Oregon Tech will continue partnership with Open Oregon Educational Resources and other entities in order to provide external professional development opportunities.
   c. A plan to communicate professional development opportunities will be included in the Library OER incentives program (goal 3.a).

5. *Support Oregon Tech created materials through creation of an institutional repository.*
   a. After 20 Open resources have been created the library will develop an institutional repository to store and make publicly available faculty created resources.

Communication plan

Upon completion and approval the textbook affordability plan will be submitted to the HECC and posted on a public facing webpage of the university. In addition the plan will be communicated to faculty through faculty senate. The plan will be made available to students through ASOIT and student leadership at both campuses. Comments and suggestions will be available through a webform where the plan is publicly posted.

In Fall 2019 a Microsoft team was created for anyone interested in open educational resources. Faculty applying for incentives through the library program or attending professional development on open education are automatically added to the team. The team is used to house relevant files and information as well as to post opportunities and information of relevance to open education.

Timeline:

- May 2019 OR HB 2213 passed requiring State Universities and Colleges to have textbook affordability plans.
- October 2019 Communication and recruitment of student participants
- November 2019 Oregon Tech Textbook Affordability Taskforce appointed
- January 2020 Textbook use survey of faculty
- March 2020 Plan goals established
- May 2020 Some members attend state Textbook affordability plan workshop
- September 2020 Draft opened for faculty review
- October 2020 Draft opened for student comment
- December 2020 Plan submitted for final approval to University Administration
- May 2021 Plan submitted to HECC

Sustainability and next steps

Each goal of the plan has been tied to a responsible office or group. These parties will be responsible for measurement toward completion. This plan is an adjustable and growing document to best support the needs of the students and the university. It is essential to success and sustainability of the plan that these parties communicate and adjust the plan periodically.

During the plan development there were three phases of broad communication with university constituents. It is expected that similar communication and planning will begin in 2023 to support updating the plan.

- Before the taskforce was appointed, presentations asking for student members and participation were given at ASOIT officer meetings at both Klamath Falls and Portland Metro campuses.
- In the data collection phase email was used to gather data from faculty in the form of a textbook use and adoption survey. The results of this survey were presented in an open forum on March 5th, 2020.
- Drafts of the plan were sent out via email to both faculty, and students (October 2020). Forums were held via electronic conference platforms to gather feedback on the draft plan in Fall of 2020.

Taskforce Membership:

- Sharon Beaudry, Associate Professor, Business
- Jolyn Dahlvig, Associate Dean of Students, Portland Metro Campus
- Andria Fultz, Associate Professor, Communication
- Ben Kintner, Registrar's office
- Dawn Lowe-Wincentsen, Professor, Portland Metro Campus Library Director
- Stephen Metsig, Student, Portland Metro Campus, Class of 2020, ASOIT-PM Officer 2019-2020
- Marci Miller, University Book store manager
- Zachary Pare, Student, Klamath Falls, Class of 2020
- Terri Torres, Professor, Mathematics, and Faculty Senate President 2019-2020
- Alan Wallace, Information Technology Services