

CA-OER Council September 2015 Progress Report

2015 Third Quarter

- See [Progress Reports](#) (pdfs available via CA-OER Council website)
- See [FAQ about the CA-OER Council](#) (available via CA-OER Council website)
- See [Presentation Slides of Legislation → ICAS → Hewlett Grant → CA-OER Progress](#)
- See **2014 & 2015 budget** (through 8/17/15 - Excel document)
- See [Map of Participants in the Council's Projects](#)

I. OVERVIEW

California Senate Bill 1052 ("Public postsecondary education: California Open Education Resources Council") was signed into law by Governor Brown on September 27, 2012.

Below, you will find the duties charged to CA-OERC and the Council's progress on these charges June-August 2015.

- A. SB 1052 declares that: "The bill would require the California Open Education Resources Council to determine a list of 50 lower division courses in the public postsecondary segments for which high-quality, affordable, digital open source textbooks and related materials would be developed or acquired, as specified, pursuant to the bill."
- CA-OERC developed criteria for selecting 50 highly-enrolled courses common across the three segments and compiled [a list of these 50 courses](#) (online document) in spring of 2014.
 - From spring 2014 into fall 2014, CA-OERC identified **more than 150 appropriate, open educational resources textbooks (OER)** for these 50 courses.
 - Through August 2015, CA-OERC in conjunction with information specialists identified CC-BY, low cost, and/or free OER "textbooks" (see [OER Glossary](#) - online document) for 47 courses. Reviews for phases 7-11 will continue through the end of September 2015 with reviews available on COOL4Ed (see [reviews](#)) by November 2015.
 - Those courses and textbooks that did not receive a review by a reviewer from one of the three segments will have a reviewer identified by Oct 5 and the review process initiated (see [list of 50 courses and reviewers](#); blue signifies the need for a reviewer).
 - **Issue (Selecting more courses):** When the review work began in Spring 2014, Council members identified 57 courses based on several factors (see the [full policy](#)): [C-ID.net descriptors](#), highly-enrolled courses that articulate across all 3 segments, course generates significant savings, course has multiple OER textbooks, among other criteria. As is apparent

from the [list of 50 courses and reviewers](#), some selected courses became ineligible for a variety of reasons (lack of reviewers; lack of OER textbooks). For this reason, in Fall 2015, Council members will select 3-5 more courses and identify corresponding OER textbooks. In light of [AB 798](#), the reviews on COOL4Ed have become even more integral to encouraging adoption of OER textbooks.

- **Issue (Highly-ranked textbooks missing):** As can be seen by the [list of 50 courses and reviewers](#), some courses do not have a viable textbook that was highly ranked. We will work with department chairs and disciplinary councils to help identify other potential OER textbooks for these courses. Since we began the work, other OER textbooks may have been published. Those courses that have no OER textbook alternative will become part of a proposed program (for 2016) to produce OER textbooks and/or part of AB 798 (tbd after the bill is finalized by Gov. Brown).

B. SB 1052 declares that: “The bill would also require the council to review and approve developed open source materials and to promote strategies for production, access, and use of open source textbooks to be placed on reserve at campus libraries in accordance with this section.”

- Since spring 2014, CA-OERC has worked with COOL4ED to make all peer-reviewed OER textbook reviews available to students, faculty, and libraries. The COOL4ED website currently [features reviewed materials for 19 of the 50 selected courses](#). Links to the original materials are on the COOL4ED website. Most of the materials are copyrighted as CC:BY, allowing faculty to print, change, share and download them for free.

C. SB 1052 declares that: “The bill would require that the council regularly solicit and consider, from each of the statewide student associations of the University of California, the California State University, and the California Community Colleges, advice and guidance on open source education textbooks and related materials, as specified.”

- As a new initiative, to capture student input, CA-OERC began holding focus groups at statewide student government meetings. The first two focus groups were held at the CCC General Assembly, May 1, 2015. Eight students attended one session; more than fifteen students attended another simultaneous session. In August 2015, a focus group with CSU students was held. A focus group with UC students is pending in October 2015.
- The results of these focus groups are being transcribed and analyzed; analysis is due by November 2015.

- Focus groups for faculty from all segments were held in June, July, and August 2015. Transcripts and analysis are forthcoming in October 2015 to aid with the Fall Pilot Project. (For more information about the focus groups overall, see below.)

D. SB 1052 declares that: “The bill would require the council to establish a competitive request-for-proposal process in which faculty members, publishers, and other interested parties would apply for funds to produce, in 2013, 50 high-quality, affordable, digital open source textbooks and related materials, meeting specified requirements.”

- This section of SB 1052 is superseded by [AB 798](#)'s activities, though the Council endeavors to work on this aspect with additional grant funding in Spring 2016.

II. OUTREACH & EDUCATION

As mentioned in the 15-month report and the May 2015 report, outreach in all three segments has been problematic. The CA-OERC began working with a public relations specialist in order to craft a marketing plan (see [OER Marketing Plan](#) - online document). Though this plan is crafted using contacts and points of information based in the CSU, CA-OERC members created similar plans for the CCC and UC systems. Details of the plan will be further established during Fall 2015.

An [FAQ](#) was published on the CA-OERC ICAS website to facilitate ease of education about the Council's projects and objectives.

A wide variety of partnerships were discussed in order to aid in education and outreach. These include, but are not limited to:

1. Partnering with bookstores, specifically [California Association of College Stores](#)
2. Partnering with [OpenStax](#) to work with bookstores
3. Existing connections
 - a. Leverage Ed Tech on each campus
 - b. Leverage library deans on each campus
 - c. Leverage UC Deans of UG Studies
 - d. Leverage existing OER programs
 - i. CCC: Online Education Initiative -- keep watch
 - ii. UC: teaching professor
 - iii. CSU: Affordable Learning Solutions
 - e. Leverage CID process

- f. Model: UCLA Adoption Project: [Initiative](#) description, [the application](#)
- g. Model: [CSU AL\\$ RFP](#)

III. RESEARCH PROJECTS - SUMMER & FALL 2015

In Spring 2014, the Babson Research Group Survey found that faculty face many deterrents to adopting open educational resources, with the top reasons being:

1. no comprehensive catalog
2. too hard to find what I need
3. not enough resources for my subject
4. not knowing if I have permission to use or change.

The survey conducted by the CA-OER Council 2014-2015 found that 60% of faculty have not ever heard of or have only a tertiary awareness about OER textbooks and the OER movement in general. (This has been demonstrated by another Babson survey released in 2015.) Only 12% of faculty from CCC, UC, and CSU systems have adopted all or parts of an OER textbook. 80% of faculty cite that academic quality is the biggest concern in adopting OER textbooks. 86% of faculty consider currency of information in OER textbooks to be very important. 66% are concerned about the efforts it takes to find, review, and select OER textbooks. Overall, 72% are willing to adopt OER textbooks with another 20% remaining neutral.

Though faculty in the CCC, CSU, and UC systems are largely unaware of or have not explored the possibility of OER textbooks, the faculty are overwhelmingly open to the possibility. However, faculty need professional development assistance to revise their existing materials to accommodate OER textbooks.

A. Pilot Project (Fall 2015)

Full details are available: [Fall Pilot Project](#) (online document)

For Fall 2015, the CA-OER Council has begun a pilot project to study faculty adoption of OER textbooks. After holding the first of three webinars, participants are clear on their duties. The selected participants are keeping track of workload, student success, learning outcomes, and more throughout the semester/quarter. Through this study, the CA-OER Council will discover what helps or hinders OER adoption and share it with faculty. The field study will also include students' perceptions of OER textbooks. While studies have been commissioned about the awareness surrounding OER textbooks, no single study has been conducted to address professional development, workload, and student implementation strategies, especially in the CCC, UC, and CSU segments. The Fall Pilot Project will provide an understanding of what services are necessary to support faculty adoption of OER textbooks.

Project Documents:

- [project description](#)
- [e-Portfolio description](#)

- [project timeline](#)
- [description of webinars](#)

Originally, this project was budgeted for 30 participants. As of May 25, 2015, the project has 25 participants: 14 from CCC; 8 from CSU; and 1 from UC. Participants have had previous experience with OER materials and are willing to adopt at least one chapter of an OER textbook. Each textbook (with the exception of one) identified for use by each faculty member costs zero dollars. With the exception of two courses, all courses have a CID correlation and are in the following disciplines: Biology, Art History, Business, Child Development, Communications, Chemistry, Mathematics, Sociology, Physics, History, and English/Composition.

Because the project involves human participants, documentation was submitted and approved by the CSU Institutional Review Board (which approval extends to all segments).

The Pilot Project focuses on the efforts of faculty across all three segments to address faculty workload issues from the perspective of faculty who have already had some experience with implementing, using, and relying on OER textbooks.

B. Focus Groups - General Description

While this will be an important step forward, the CA-OER Council found that it needs to hear from those who have not used OER materials or textbooks in their courses. Similarly, the CA-OER Council would benefit from responses by students beyond the initial survey conducted in Spring 2014. Focus groups with faculty adopters and non-adopters are planned to further examine faculty perceptions of OER. By speaking with faculty and students the CA-OER Council will discover why OER adopters were successful and motivated to adopt in addition to finding out why non-adopters do not use OER and what would convince them to do it. This will help to design an outreach program that effectively targets faculty adoption. In addition, these efforts will give evidence to obstacles and triggers for OER text adoption.

Each focus group session consisted of 3-6 participants and lasted 50 minutes per session. Faculty participants were provided a stipend of \$100 each. For the OER-experienced groups, the participants were selected from a pool of participants who have indicated their willingness to participate on the designated dates as well as their level of experience with OER materials. For the student focus groups, various CA-OER Council members visited student governance meetings for the CSU and CCC. The Council anticipates holding a UC student focus group in October 2015. The faculty who are not aware of or who have not used OER textbooks or materials are a more difficult group to assemble. The CA-OER Council will work towards visiting faculty governance meetings in person in all three segments in order to attract participants and conduct the focus groups on-site. (Faculty governance meetings and area meetings are optimal; the CA-OER Council is in the process of identifying those meetings and making contact with the organizers during Fall 2015.)

C. Student Focus Group - Informal Findings

The first focus group occurred at the CCC student legislation meeting on May 1 in Ontario (facilitated by CA-OER members, Chikako Takeshita and Ruth Guthrie). While attendance at these two focus groups exceeded expectations, the facilitators found that most participants did not have OER experience, with the exception of the Computer Science students who had used online textbooks because traditional textbooks are too expensive. These students expect learning modules to be included in an OER textbook. In addition, they requested OER textbooks to be distributed via PDF for easy access, cost, and annotation/highlighting capabilities. Most CCC students cannot afford a computer or laptop. They can afford a Kindle, from which they can access a PDF. Most students like digital for searching purposes. If searching isn't too important, most students prefer print for deep learning.

In August 2015, Ruth Guthrie led a focus group with CSU students and was able to informally assess differences between CSU and CCC students as follows:

- CSU student said they never read a book on a phone but, the CCC students did it frequently
- CSU students really liked printed books for studying.
- CSU students were not as forthcoming as the CCC students about pirated text books. But, after the recorder was off, I asked them about it and they all said they did it. But, they also said they were more than willing to purchase the book legally if the price was fair.
- The CCC students predominantly said the publishers were the problem. The CSU students spoke about the University being the problem.

Impact on CA-OERC Research

1. CA-OERC needs to determine how students prefer to annotate and take notes while reading during fall pilot webinar
2. It would be interesting to determine OER use between Science vs. Humanities.

D. Faculty Focus Groups - OER Experienced

Using the existing contact information for faculty who volunteered to review OER textbooks, CA-OERC sent a call for participation that included a brief Google Form survey to assess each potential participant's involvement with OER. Of the 443 invitations, 100 potential participants responded by the deadline with 3-6 faculty members attending each focus group.

Each group consisted of a variety of the following:

- 2 faculty per segment, if possible (though only 12 UC faculty responded & many UC faculty dropped out before the meeting date)
- discipline (a variety is optimal)
- place in career (new to teaching, assistant/associate/full professor, stakeholder in the department/college/university, potential OER champion)
- level of employment (e.g., lecturer/part-time or full-time faculty)

During the focus groups specifically geared towards OER-experienced faculty, the following are the primary objectives and queries:

- Objectives
 - why are you using OER? or not (and can CA-OER fix them)
 - what are the barriers & incentives that we can add to our pilot project
 - who are the possible ambassadors on various campuses
- Questions
 - develop list of effective practices (what worked/what didn't)
 - describe course used OER
 - textbook & course savings?
 - perception on student success?
 - have you heard of adaptive textbooks? in reference to commercial publishers?
 - students reactions after implementing OER
 - experience? benefits after?

Transcripts and analysis of these faculty focus groups is ongoing. Though some preliminary, informal notes have been shared with the Council, those informal findings are insufficient to report to ICAS at this time. (The Council anticipates having a full analysis in October 2015.)

E. Faculty Focus Groups - OER Inexperienced

Contacting those faculty who are not aware of or do not use OER textbooks has proved more challenging. CA-OERC proposes to conduct these focus groups at a series of in-person statewide meetings held by each segment, including, but not limited to:

- CSU: [CSU Symposium](#)
- CCC: online teaching conference
- UC: (we need help here, if ICAS has a recommendation)

The objectives and questions for this set of faculty differs slightly:

- Objectives:
 - understand CA faculty & what could drive them to adopt OER textbooks
 - discover barriers to adoption
 - tacitly educate faculty further about OER
- Questions:
 - what makes a “good” textbook for adoption (non-OER)
 - what makes a good incentive for adoption
 - barriers to adoption (for different systems, campuses, departments)

F. Campus Ambassadors

Using the existing list of CA-OER Council project participants (see [Map of Participants](#)) from reviewers, focus groups, Fall pilot project participants, and even from the survey contacts, the

Council is working towards creating an infrastructure on each campus for a faculty ambassador. The Council believes that having an ambassador on each campus will allow for further outreach, education, and adoption of OER textbooks. In addition, a campus ambassador can facilitate the application for funds from AB 798 (potentially - but this plan is not fully formed yet). Below are nascent details about this potential program as discussed in May 2015 and at the September meeting (in addition to the recommendations made by ICAS at the June 2015 meeting):

- i. leverage [CSU Digital Ambassador program](#)
- ii. work with academic senates
- iii. CCC: ADT = discipline faculty in all segments – have send via listserv
 1. created for CID: they're responsive
- iv. can do massive faculty professional development sessions
 1. perhaps OER session on how to use OER
- v. write into description of faculty ambassadors to report to governing body on each campus; maybe a report
- vi. Have ambassadors propose plans for the outreach to faculty
- vii. provide w/slide deck, toolkit, and videos about OER, student use of OER textbooks, faculty integration, COOL4Ed reviews, and more

The Council will report on this program when it is more developed this Fall.

IV. AB 798 Infrastructure & Implementation

If Governor Brown signs the final version of [AB 798](#), the focus of the Council's work this Fall will shift towards creating an infrastructure for the implementation of AB 798, including but not limited to establishing a grant application process in addition to a mentoring process to foster good applications. Review criteria, deadlines, etc. will also need to be established in order to meet the requirement of issuing awards 60 days after submission of an application (with a June 30, 2016 deadline for all applications). With a potential of 100 awards and maximum \$50,000 award for this first round, the Council will need to be judicious in its efforts to guide campuses towards successful applications complete with cost analysis, usability/adoption metrics, and other benchmarks being carefully met.

When AB 798 goes into effect January 1, 2016, the membership of the Council should remain the same, including the UC members. There has been some discussion about the efficacy of retaining the three segments on an intersegmental project due to the elision of the UC in AB 798. Per the Council's September meeting, including the existing UC faculty on the Council continues the goodwill work of this unique and productive intersegmental project. In addition, the existing UC Council members are now experts in the area of OER implementation, adoption, outreach, and education. Both the CSU and the CCC Council members agree that including the

UC in the implementation of AB 798 will benefit the purpose and spirit of SB 1052 as well as continue the good work of bringing the three segments of California higher education together.

IV. Final Report

As requested at the June meeting of ICAS, below are topics (including, but not limited to) for the Council's final report. Though the legislation states that a final report is due in December, the Council's work is active through December 30 (as previously mentioned at the June 2015 ICAS meeting). During January, the Council will finalize its report and deliver to ICAS by February 1, 2016. At that time, [AB 798](#) will be active, the infrastructure for fostering, developing, and accepting AB 798 grant applications created, and the Council's activities will be primarily in support of AB 798 in addition to other outreach projects that are in development this Fall (and contingent upon matching grant funding by COOL4Ed).

Final Report Topics:

- How effective is the intersegmental action?
- Reading Practices Research
- Textbook Reviews for 50 courses
- OER repository to complement OER textbooks
- Results of focus groups & resulting research questions
- Outreach & Publicity needs for OER (past, present, future)
- Creating Usability measures (on task for Fall 2015, but also part of future)
- Work to be done beyond the scope of the CA OER Council's work concluding Dec 2015
 - OER textbook production for in-need areas
 - central location for OER work in California (e.g., Center)
 - continue reviews of textbooks & selection of common courses that articulate across all campuses (i.e., CID or UC Pathways?)
 - OER conference specific to the State of California (intersegmental)
- Fall Pilot Project
 - How to support faculty who adopt OER (e.g., campus services; workload support)
- Implementing [AB 798](#) (infrastructure)
- Use of faculty ambassadors