CA-OER Council May 2015 Progress Report
2015 Second Quarter
See 15-Month Progress report through March 2015

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 March - May 2015 with plans for Fall 2015 projects and nascent ideas for Year 3 (2016).

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 May 2015, CA-OERC in conjunction with information specialists continues working to identify CC-BY, low cost, and/or free OER "textbooks" (see OER Glossary - online document) for courses in phases 7-11. Textbooks for phases 5 and 6 have been identified and will be reviewed in June 2015.
- Those courses that did not have an adequate number of textbooks (3 or more), for which no textbook received a favorable review, or that did not receive a review by a reviewer from one of the three segments will become part of the extra phase 11 to be completed in Fall 2015.
- **Issue:** CC-BY OER textbook production has not been widely accepted as a valid form of authorship. A few commercial publishers (e.g., Wiley) are offering "digital" textbooks that can be re-mixed by faculty; however, these textbooks are not low-cost. The selection of OER textbooks remains problematic, but with the education and awareness of faculty members in using and authoring OER textbooks, the CA-OERC anticipates wider authorship of OER textbooks in the next two years,

especially in areas where need is great (e.g., Child Development, Literary Studies, Chemistry, Mathematics, to name a few).

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."

- As of spring 2015, CA-OERC continues to recruit faculty reviewers. The review process is currently being coordinated for **an additional 40 courses and 120 additional reviews through August/September 2015**.
- 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 10 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. Focus groups at the state CSU and UC student government meetings are being arranged (UCSA, September; CSSA, August).
- The results of the first focus group are being transcribed and analyzed; analysis is due by August 2015. (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."

- Given its current workload, CA-OERC has deferred action on this provision until Year 3 (2016). Conversations on this aspect of SB 1052 will continue during the first few meetings of Fall 2015 to explore pathways for infrastructure and outreach to all segments and their faculty.

II.   OUTREACH & EDUCATION

As mentioned in the 15-month 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 Summer 2015 to be implemented in Fall 2015.

An FAQ was drafted to be included on the CA-OERC ICAS website to facilitate ease of education about the Council's projects and objectives. The FAQ will be published during Summer 2015.

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)

In Fall 2015, the CA-OER Council will conduct a pilot project to study faculty adoption of OER textbooks. The selected participants will keep 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.

Originally, this project was budgeted for 30 participants. As of May 25, 2015, the project has 25 participants: 17 from CCC; 7 from CSU; and 2 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 provisionally approved by the CSU Institutional Review Board (which approval extends to all segments).

The Pilot Project will focus 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 will consist of 6 participants and will last 50 minutes per session. Faculty participants will be 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 will visit student governance meetings from all three segments at various times from May - December 2015 (as these meetings are set by student governance organizations). 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.)

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 textbook 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.

> *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.

The 6 focus groups for the OER-experienced faculty will be conducted in June, July, and August via online meeting software (Collaborate) by Katherine D. Harris with support from Theresa Dykes. (Collaborate will allow for recording the session automatically.) With such an overwhelming response, all 6 focus groups have been filled with a variety of faculty who are OER-experienced. Each group consists of a variety of the following:

- 2 faculty per segment, if possible (though only 12 UC faculty responded)
- 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?

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 (June)
- 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)

At the first meeting in September 2015, the CA-OER Council will review the analysis of these focus groups. By December 2015, the CA-OER Council hopes to have conducted 6 focus groups for those who are unfamiliar with OER in time to review the information in conjunction with findings from the Pilot Project.

IV. YEAR 3 ACTIVITIES (2016) - PROPOSED

The CA-OERC concluded its meetings with several discussions surrounding the proposed bill, AB 798, complementary legislation to SB 1052 and SB 1053. The resulting response (online document) is based on the draft bill provided to the CA-OERC in April 2015. Because AB 798 is evolving as it continues through Assembly committees, the CA-OERC had an opportunity to review and discuss proposed draft amendments provided May 6, 2015. After subsequent conferences with both Steven Filling and Sarah Brady (staffer with Assemblymember Bonilla), it is apparent that more coordination between ICAS and the CA-OERC is necessary in order to represent a unified vision from the faculty in the three segments. (Notes of the May 20 meeting between Katherine D. Harris and Sarah Brady were provided to Steven Filling. There has not been enough time to revise those raw notes into a cohesive document for inclusion in this progress report.)

Regardless of the outcome of AB 798, the CA-OERC is in very early discussions to focus on adoption, production, implementation, and infrastructure in year 3. CA-OERC envisions leveraging faculty who have already converted to OER textbooks, supporting ambassadors and curators on each campus, and providing space to demonstrate the use of OER textbooks. CA-OERC's primary focus in 2016 will be an RFP for production of OER textbooks that are then sent through the review process. Another possibility would be to leverage relationships with the technology industry to solve the issue of media format/platform. CA-OERC could also work with general education departments as they make textbook decisions. These are all nascent working ideas.

Much of the CA-OERC April and May meetings were consumed with crafting a response to AB 798 and discussing the proposed draft amendments. CA-OERC will continue its discussions surrounding Year 3 activities with the intention of submitting those proposals to ICAS in late October.