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To: Intersegmental Committee of the Academic Senates (ICAS)

From: Gerry Hanley, Assistant Vice Chancellor
Academic Technology Services, California State University

A handwritten signature in black ink that reads 'Gerard L. Hanley'.

RE: Request a faculty committee to evaluate "Bonus Funding" proposals for AB 798
(California College Textbook Affordability Act of 2015) in July/August 2018

Date: January 19, 2018

BACKGROUND:

The California College Textbook Affordability Act of 2015 (AB 798) included the reallocation of SB 1052/1053 funds (\$3,000,000) to support the adoption of free and open educational resources in the CCC and CSU. Under AB 798, the California OER Council completed its responsibilities in reviewing the RFPs and recommending funding for 27 CCC and 19 CSU campus textbook affordability plans. The CA OER Council members received \$3,000 each for completing the reviews and recommendations as specified in AB 798. Approximately \$1.7M in funding was allocated to the campuses (approximately \$850K for each system). As communicated in a March 2016 memo to ICAS, the CA OER Council was terminated December 2016 with the end of the grant funding allocated for the CA OER Council.

The CSU has continued to support CCC and CSU campuses in implementing their textbook affordability program under AB 798 through annual conferences (February 2016, February 2017, and January 2018), monthly webinars, and individual campus consultation (see <http://www.cool4ed.org/community.html>). New funding from the Hewlett Foundation to the CSU and matching state funding has enabled the CSU to provide support for the goals and requirements of AB 798 as well as to scale the California Open Online Library for Education (COOL4Ed) program across the nation. In addition, we have expanded our support for CCC and CSU campuses responding to SB 1359.

AB 798 BONUS FUNDING: NEW ELEMENTS in RFP

We are poised to release the second round AB 798 RFP to the CCCs and CSUs in order to spend out the remaining \$1.3M. To encourage and expand more CCC and CSU campuses to participate in the Textbook Affordability Program, we have added an option to the RFP for any campus who did not apply for funding in the initial round of the program to partner with a CCC or CSU that is a current awardee. Section 6.1 of the RFP for BONUS FUNDING provides the process and requirements for campus partnerships (<http://www.cool4ed.org/rfp.html>) along with the funding priorities. The CSU will be sponsoring a [1 day conference on January 30, 2018 to present the Bonus Funding RFP process](#). The CSU will be covering the cost of registration for CSU and CCC participants. The opportunity to participate in the conference has already been communicated to the CCC and CSU, and over 95 participants from the CA higher ed systems have registered.

REQUEST of ICAS:

An RFP for “Bonus Grants” to distribute the remaining \$1.3M from the AB 798 allocation is to be offered and administered by the CSU in 2018 in accordance with legislation. The CSU has funding to support nine (9) faculty who would review the proposals for the “Bonus Grants” (\$3,000 stipend for each proposal reviewer) in July-August 2018. No travel required. Online meetings only.

I request that ICAS select the nine (9) faculty members for the AB 798 Bonus Grant Proposal Review Committee. The faculty committee would be composed of 3 faculty from each of the higher education segments (CCC, CSU, and UC) as defined within AB 798. Since the only responsibility of the committee will be to review the proposals and provide their recommendations to the CSU Office of the Chancellor, I do not think re-establishing the CA OER Council would be appropriate since the scale and scope of the work for this committee is limited and short-term. However, ICAS can decide what it thinks is most appropriate. The AB 798 legislation provides ICAS the option to create a “successor group”.

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(a) The California Open Education Resources Council is hereby established. The council shall be composed of faculty leaders from the three segments of public postsecondary education, and shall be administered by the Intersegmental Committee of the Academic Senates of the University of California, the California State University, and the California Community Colleges, ***or a successor group*** [bold and italics added].

The COOL4Ed Team will support the AB 798 Bonus Grant Proposal Review Committee members with:

- Facilitating the RFP application and submission process.
- Facilitating webinars/virtual meetings to review the AB 798 legislation and the evaluation rubric defined within the AB 798 RFP along with additional review criteria developed by the CA OER Council and COOL4Ed when needed (See appendix A for the evaluation rubric).
- Facilitating the proposal review process by providing members with the proposals and scoring sheets, along with directions for completing the reviews via online review software in a timely manner.
- Summarizing the committee evaluations and communicating the final recommendations.

I would greatly appreciate it if ICAS would provide its selection of faculty to participate in the AB 798 Bonus Funding Proposal Review Committee by May 1, 2018 so we can provide the proper support for the successful execution of their responsibilities.

The AB 798 Bonus Funding Proposal Review Committee members would complete their work in July and August of 2018 and would provide their recommendations for funding proposals to the CSU Office of the Chancellor by August 31, 2018 (in accordance with AB 798). Faculty would receive their stipend after the completion of their assigned work.

NEXT STEPS:

I would be happy to host a conference call or virtual meeting with ICAS or Chairs of Statewide Academic Senates of the CCC, CSU, and UC to address and respond to questions and issues ICAS might have about the program and process. I would also welcome feedback on the proposed evaluation process and RFP.

Thank you in advance for your consideration of this request and I look forward to your response.

Appendix A: AB 798 Bonus Funding RFP Proposal Evaluation Rubric

The rubric below is composed of 2 sets of criteria. The first set of criteria (Questions 1-7) reflect requirements that proposal must meet (all are required) to be eligible for an award. The second set of criteria (Questions 8-16) reflect dimensions that proposals can vary in their capabilities and abilities to deliver on the goals of their textbook affordability program.

7.1 Criteria required to be eligible for funding:

1. The proposal has included their campus academic senate resolution that meets the requirements of AB 798. (If the proposal includes a partner campus, academic senate resolutions from both campuses must be included.)
 - a) YES
 - b) NO
2. The proposal has included a plan for their AB 798 textbook affordability program that was approved by the campus academic senate. (If the proposal includes a partner campus, academic senate approvals of plans from both campuses must be included.)
 - a) YES
 - b) NO
3. All the courses included in the campus' plan for their AB 798 textbook affordable program will be implemented by June, 2020.
 - a) YES
 - b) NO
4. All the course sections included in the campus plan for their AB 798 textbook affordability program will have an estimated savings to students of 30% or more.
 - a) YES
 - b) NO
5. Every course included in the Campus Textbook Affordability plan must include some free and open educational resources that are being adopted by faculty and used by students in the course. These materials that are partial or complete substitutes for existing course materials meet the requirement for being **free for students and** with a public domain license **or free for students with** a Creative Commons license or **free for students with** legal licenses for acceptable use by faculty and all students in the course.
 - a) YES
 - b) NO
6. The campus plan includes a Textbook Affordability Campus Coordinator assigned to fulfill the required activities. (If the proposal includes a partner campus, a Textbook Affordability Campus Coordinator for each campus must be assigned.)

- a) YES
- b) NO

7. The proposal describes how the campus will provide access to open educational resource materials for students, including how the campus will make hard copies of these materials available for students who lack access to these materials off campus and make it possible for students with such access to print hard copies. (If the proposal includes a partner campus, access plans from both campuses must be included.)

- a) YES
- b) NO

TOTAL SCORE: Must have seven (7) yes's to be eligible for funding

7.2 Criteria to evaluate the relative quality of the campus proposal

8. The proposal for the campus coordinator(s) meets the requirements in the RFP and addresses the recommendations of the California OER Council
- 4- Meets all requirements, leverages existing organizations, and addresses many recommendations
 - 3- Meets all requirements and addresses many recommendations
 - 2- Meets all requirements and addresses a few recommendations
 - 1- Meets all requirements and not address recommendations
9. Proposed activities are reasonable and well-planned, with a high likelihood of achieving the intended outcomes
- 4 – The proposal is very well-crafted, with a clear description of reasonable activities, a practical timeline, and achievable objectives.
 - 3 – The proposal has a description of reasonable activities, a practical timeline, and achievable objectives.
 - 2 – The proposal has a description of activities, a timeline, and objectives, but one or more parts of the plan are vague or questionable.
 - 1 – The project plans are hard to understand, vague, and/or unreasonable.
10. Proposed services to support faculty and student participation in the campus's Textbook Affordability Program are comprehensive, aligned with campus culture and resources, and supportive of the goals for the campus plan
- 4 – The proposed services are inclusive of all the types of services supportive of a textbook affordability program as outlined in the RFP, effectively leverages existing services, and are targeted to the needs of faculty and students.
 - 3 – The proposed services are inclusive of at least 5 types of services supportive of a textbook affordability program as outlined in the RFP, partially leverages existing services, and are targeted to the needs of faculty and students.
 - 2 – The proposed services are inclusive of no more than 3 types of services supportive of a textbook affordability program as outlined in the RFP, do not leverage existing services, and it is unclear how they are aligned with the needs of faculty and students.
 - 1 – The proposed services are not articulated affordability program as outlined in the RFP, does not leverage existing services, and not aligned with the needs of faculty and students.

11. Scope of impact on cost savings, course sections, number of faculty, students or staff.
 - 4 – Description of cost savings and impact to campus is well supported to have a highly significant impact.
 - 3 – Description of cost savings and impact to campus is well supported to have a significant impact.
 - 2 – Description of cost saving and impact to campus is smaller in scale but still meets the 30% cost savings requirement.
 - 1 – Description of cost savings and impact to campus is unclear but still meets the 30% cost savings requirement.
12. How materials/practices are disseminated to students/stakeholders.
 - 4 – Project plan describes how the benefit of OER practices, processes and/or materials OER will be distributed to students and/or stakeholders in a reasonable, achievable way.
 - 3 – Project plan describes good practice and processes for OER distribution.
 - 2 – Project plan describes good practice for OER distribution.
 - 1 – Project plan is weak in its description of support for distribution of processes, practices and mechanisms.
13. Budget is reasonable, and justification is provided for each item
 - 4 – Plan is accurately budgeted and a strong justification for its utility is given.
 - 3 – Plan is accurately budgeted and justification for its utility is given.
 - 2 – Rationale for budget shows moderate support for plan.
 - 1 – Request is not clear or reasonable.
14. Project is sustainable
 - 4 – Project has a strong campus support/interest; there is a strong possibility of developing an OER culture on campus that is sustainable in multiple areas and across multiple disciplines.
 - 3 – Project has some campus support/interest; there is a good possibility of developing an OER culture on campus that is sustainable in some areas or across multiple disciplines.
 - 2 – Project has limited campus support/interest; there is a limited possibility of developing an OER culture on campus that is sustainable.
 - 1 – No indication that practices from the proposal will be ongoing.
15. The plan(s) for reporting on the outcomes of the campus' textbook affordability program are comprehensive and should be effectively and reliability implemented
 - 4 – The reporting is assigned to an organization and personnel with the expertise, resources, and a sustainable interest to collect and report on the success of the program for the next 4 years.
 - 3 – The reporting is assigned to a reasonable organization and personnel, with a sustainable interest to collect and report on the success of the program for the next 4 years.
 - 2 – Rationale for budget shows moderate support for plan.
 - 1 – Request is not clear or reasonable

Total: 32 points maximum score