Accelerating Momentum

The Report of

The University of Texas System
Affordable Learning Accelerator Task Force

September 2020

Foreword from the Task Force Co-Chairs – September 2020

We are living in a singular moment—

> when the democratization of knowledge through technology both removes and underscores deep divides in terms of access, usability, and the power conferred by unfettered access to knowledge;

> when a global pandemic is killing people and erecting further barriers to accessing technology, knowledge and education, not to mention health care and basic needs like food and housing;

> when the United States has embarked upon a renewed civil rights movement, with tragic origins in violence towards and the killing of Black and other people of color, yet inspiring hope and requiring activism to ensure that this time, is—and must be—different.

The worldwide movement towards Open—Open Educational Resources (OER), Open Access, Open Data, Open Source Software, Open Science—is driven by a commitment to equity and social justice. Educators worldwide are committed to leveraging OER to promote deeper learning, engagement and success for students, in particular those who have been historically underserved because of socio-economic status, race and ethnicity, ability, and other demographic characteristics, both immutable and constructed.

This is the moment when the UT System's Affordable Learning Accelerator Task Force has been completing its research, analysis, deliverables, report and recommendations. Was the work interrupted by COVID-19 and the pivot almost overnight to remote everything at the System's 14 institutions? Yes. Was it enriched by that pivot and the foregrounding of the precariousness of so many of our almost 240,000 students, precariousness that is financial, health-related, technological and educational? Absolutely. This is the context in which we present a set of recommendations, organized around a central recommendation to commit to an OER momentum strategy for the UT System. That strategy is already underway at every academic university and many of the health institutions across the System. That strategy is a way to honor, recognize and build upon work underway, led by libraries, faculty, students, and administrative leadership. And it is a way to deepen the UT System's commitment to student success, with particular attention to its pillars of financial well-being and belonging, belonging that is academic, social and financial.

As co-chairs, we would like to express our gratitude to UT System Chancellor J.B. Milliken, outgoing Executive Vice Chancellor for Academic Affairs Steven Leslie, and to others as well:

> Institutional presidents and provosts have been generous in their attentiveness to OER and a rapidly evolving landscape of learning resources, and in allowing their staff to serve on a 16-month task force.

> The System's faculty and student governance groups have been supportive in different ways, with the Faculty Advisory Council being receptive to the changing of curricula, roles and rewards that are a part of OER engagement.

The Student Advisory Council has remained relentless in their insistence that UT System institutions pay far greater attention to the ever-rising costs of textbooks and other learning materials, one key driver in a national higher education affordability crisis.

The libraries of the UT System have been the leaders on OER, repositories of so much more than books these days, and essential partners in the research, service and student success missions of the 21st-century university.

Finally, words cannot describe our appreciation and indebtedness to our task force members. They have been creative and inspiring thought partners and leaders as well as worker bees who dedicated their time to a task force that didn't always have a linear process, yet was guided throughout by a collective commitment to student success and making sure that their institutions and the UT System kept that front and center, along with fidelity to quality teaching and learning, the integrity of the curriculum, and the continuity of academic operations. The momentum is theirs, and we honor and thank them for it.

Dean Hendrix, Dean of Libraries
University of Texas at San Antonio

Rebecca Karoff, Associate Vice Chancellor
Office of Academic Affairs
The University of Texas System

Affordable Learning Accelerator Task Force Members

UT Arlington
- Dr. Pranesh Aswath, Provost and Vice Provost for Academic Affairs (*ad interim*)
- Dr. Paul Kittle, Senior Associate Vice President for Student Affairs
- Michelle Reed, Director of Open Educational Resources

UT Austin
- Dr. Lorraine Haricombe, Vice Provost and Director, UT Libraries
- Dr. Christian Hilchey, Lecturer, Department of Slavic and Eurasian Studies
- Colleen Lyon, Head of Scholarly Communications, UT Libraries

UT Dallas
- Dr. Darren Crone, Assistant Provost and eLearning Director
- Dr. Joseph M. Izen, Professor of Physics, Academic Senate
- Dr. Ellen Safley, Dean of Libraries

UT El Paso
- Dr. Beth Brunk-Chavez, Dean of Extended University and Professor of Rhetoric and Writing Studies
- Dr. Virginia Fraire, Associate Provost for Academic Affairs

UT Permian Basin
- Dr. Dan Keast, Professor and Chair of Music
- Clark Moreland, Lecturer, Department of English

UT Rio Grande Valley
- Dr. Art Brownlow, Professor of Music and Provost's Fellow for Academic Innovation
- Justin White, Scholarly Communications Librarian

UT San Antonio
- Dr. Dean Hendrix (Co-Chair), Dean of Libraries
- Dr. Gail Pizzola, Senior Lecturer, Writing Core Program
- Clay Haverland, Assistant Vice President for Campus Services

UT Tyler
- Dr. Colleen Swain, Associate Provost for Undergraduate and Online Education, Professor of Education
- Terra Gullings, Head of University Archives and Special Collections, Professional Librarian

UT System Faculty Advisory Council (FAC)
- Dr. Nikos Vasilakis, Professor and Vice Chair for Research, Dept. of Pathology, UT Medical Branch at Galveston
- Dr. Ravi Prakash, Professor of Computer Science at UT Dallas

UT System Student Advisory Council (SAC)
- Alejandro Saldivar, Student, UT Rio Grande Valley

Library Directors
- Rebecca Bichel, Dean of Libraries, UT Arlington, and Chair, UT System Advisory Committee on Library Affairs

UT System
- Dr. Rebecca Karoff (Co-Chair), Associate Vice Chancellor for Academic Affairs
- *Ex Officio*: Patrick Francis, Associate Vice Chancellor for Health Affairs
- Weston Rose, Program & Communications Coordinator, Office of Academic Affairs
- Audrey Stein, Graduate Student Associate and Ph.D. Student in Learning Technologies Program, UT Austin College of Education
- Ashley Reyes, Senior Administrative Associate, Office of Academic Affairs

Former Members
- Carlos Herrera, Graduate, UT Health Science Center at San Antonio
- Tania Torres, Graduate Student Associate and MSW Candidate, UT Austin School of Social Work

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I. Executive Summary

Accelerating Momentum is the report of The University of Texas System Affordable Learning Accelerator Task Force. The task force was convened to support and accelerate institutional efforts to expand the availability and affordability of high-quality, no- or low-cost, cutting-edge and new-generation instructional and learning resources to students.

The task force spent considerable time reviewing the learning resources landscape across UT institutions, Texas and the country. Its interest was not to conduct research but rather to develop a set of evidence-based recommendations, strategies and actions to help build capacity and momentum around no- and low-cost learning resources for students with a particular focus on Open Educational Resources (OER). OER are free resources that are licensed to allow for revision and reuse. They include not only textbooks but also ancillary course materials including videos, homework sets and quizzes, learning modules, courseware and more.

Intertwined throughout this purview was a strong focus on affordability and ways to reduce financial barriers and burdens on students by taking a hard look at newer-generation, largely digital learning resources. The task force focused broadly on financial well-being as critical to student success and engagement, as well as quality, equity and inclusion as core values of the UT System. Equally core to the UT System—and respected throughout by the task force—is the recognition of the authority faculty have over the curriculum, including decisions regarding what textbooks and other learning resources to use in their courses.

The task force also focused—in terms of its membership, analysis and recommendations—on the UT System's eight academic institutions, where the majority of the System's students are enrolled, the majority of textbooks are purchased, and the majority of OER innovation is taking place. The task force hopes that the System's six health institutions will find meaningful ways to engage with the report as well.

Report Overview

The task force's full body of work is both written and web-based. The written report is designed to provide Chancellor J.B. Milliken and other System and institutional leaders an overview of the context and territory covered by the task force along with key findings and a set of recommendations. Its purpose is to make the case for accelerating OER momentum across the UT System.

Additional content developed by the task force will be housed on a website, designed to supplement understanding and guide implementation of the recommendations. The website will serve as an information hub, and include guidelines, strategies, and best practices for greater engagement with OER and other low-cost learning resources.

The Learning Resources Landscape

There are many people across the UT System who are leading the way on reducing costs and removing financial and other barriers to student success, among them students, provosts, faculty, students, library directors, and a host of campus student success leaders. The formation and work of the task force represent a response to the growing convergence of interest and activity Systemwide, coalescing around OER and other digital and online instructional and learning resources as high-impact avenues which:

- Alleviate student financial burdens;
- Increase college affordability;
- Enable more students to be more effective learners, and feel like they belong and can succeed at UT institutions; and
- Empower faculty to collaborate and share learning resources.

The task force's work also takes place in a textbook and learning resource landscape that is complex and undergoing significant changes, demonstrating the significant need for OER:

- Course material costs have risen three times faster than the rate of inflation over the past two decades.
- It is estimated that U.S. students should spend up to $1,000 per year on textbooks and other required learning materials.
- OER are gaining momentum across the UT System, Texas, and the nation as *no-cost to students* learning resources of choice.
- Emerging research shows that OER can improve course grades and support equal opportunity for student success.
- OER solve a textbook affordability problem endemic to higher education, and across UT institutions. They are adaptable to modalities and delivery models; they are customizable by users so that instructors can adopt and adapt them for and to their pedagogical and course needs. Additionally, OER are available to students and instructors *immediately and forever*.
- While free to students, OER are not free to develop and provide; they require investment and infrastructure to embed them into the academic ecosystem.
- The commercial publishing industry is undergoing significant changes, which have an enormous impact on the access and affordability of learning resources available to students, as well as on the faculty, departments, libraries, bookstores and other units who select and purchase them.

The task force has engaged with all these issues, which serve as both context and key findings. The task force recommendations are intended to serve as solutions to the challenges, opportunities, and imperatives posed by them.

Task Force Recommendations

The task force arrived at an overarching recommendation foundational to keeping education affordable for the UT System's 240,000 students through a more coordinated commitment to OER:

The UT System should invest in OER through commitment to a 3-year OER Momentum Strategy.

The ten (10) additional recommendations (see table below) flow from the proposed three-year OER Momentum Strategy. Each of the recommendations requires commitment of resources—time, money, people—at a moment when UT institutions and their students face financial uncertainty and vulnerability. The recommendations are designed to make UT institutions' degrees more affordable for, and represent a commitment to equity and inclusion through the removal of financial barriers to, students. They are also designed to be customizable by each UT institution, according to institutional context, culture, resources, and needs.

Finally, the task force recommendations leverage and amplify the remarkable commitment and leadership of UT institutions, most of which are already embarked on capacity-building and greater commitment to Open Educational Resources, as well as Open Education more broadly (including scholarship, data, science, etc.). The recommendations embrace innovation, in support of the UT System's growing strength in online educational delivery, adaptive learning, and new-generation learning modalities and resources. They require shared responsibility and advocacy, and the task force believes they will lead to both improved and more equitable student outcomes, and higher quality learning environments.

II. Recommendations from The UT System Affordable Learning Accelerator Task Force

Overarching Recommendation: The UT System should invest in OER through a commitment to a 3-year OER Momentum Strategy.

- The 3-year OER Momentum Strategy includes ten (10) distinct recommendations, enumerated below.

Recommendation 1: The UT System and institutions should make a financial investment in OER through:

a. Institutional allocations of funding to OER capacity-building with a focus on faculty and libraries—building on work already underway; and/or
b. Funding from the UT System Board of Regents for OER at institutions to include in-kind contributions from institutions; and/or
c. Pursuit of Texas GEER funding being made available to the THECB in support of OER and other new-generation, online learning resources, as well as other governmental and philanthropic funding opportunities.

Recommendation 2: The UT System and institutions should adopt an Affordability Mindset across the UT System.

Recommendation 3: The UT System and institutions should assess OER impact on return on investment (ROI) to students and institutions, learning outcomes, student success outcomes, and student and faculty satisfaction based on common assessment standards.

Recommendation 4:   The UT System and institutions should adopt a coordinated approach to increasing the use and development of OER homework sets and test bank questions, platforms and infrastructure across the UT System.

Recommendation 5: The UT System and institutions should adopt a coordinated Systemwide approach to educating students, faculty, staff and administrators about proprietary course materials published and sold by commercial publishers and vendors. Proprietary course materials may include, but are not limited to, automated purchasing programs ("Inclusive Access"), access codes for homework platforms, online bundled course materials or curriculum packages, automated grading software, and new print textbooks.

Recommendation 6: The UT System and institutions should recognize faculty OER engagement in tenure and promotion policy and/or guidelines.

Recommendation 7: UT institutions should commit to integrating OER into courses in the Texas Core Curriculum, supported by the Texas Higher Education Coordinating Board's OER grant program and OER Commons microsite, and inspired by *Z-Degrees* (*zero-textbook-cost* associate degrees) at the community colleges.

Recommendation 8: The UT System and institutions should adopt best practices for complying with state and federal legislation regarding OER and course material disclosure.

Recommendation 9: The UT System and institutions should develop an ongoing OER legislative strategy, including one that might involve collaboration with other Texas university systems and educational partners.

Recommendation 10: The UT System Chancellor, in consultation with institutional leadership, should appoint a follow-up UT System group or council to support, enhance and oversee the 3-year UT System OER Momentum Strategy.

III. Task Force Report

Introduction

Almost one year into the work of the UT System Affordable Learning Accelerator Task Force, and in the months leading up to what was supposed to be its culmination, the world faced the COVID-19 pandemic. While the disruption to higher education was both unimaginable and unprecedented, it provided a critical need across UT institutions to crystallize priorities in order to ensure academic continuity and—above all—the quality teaching, learning, and support vital to the UT System's 240,000 students being able to meet their educational goals. Affordability became paramount in new ways, as did the need for, and incorporation of, new-generation digital and other tools on which such continuity depended.

There are many across the UT System who are leading the way on reducing costs and removing financial barriers to student success, among them presidents, provosts, faculty, students, library directors, and a host of campus student success leaders from both academic and student affairs. The task force was formed in response to the growing convergence of interest and activity Systemwide, coalescing around Open Educational Resources (OER)[1] and other digital and online instructional and learning resources, as high-impact avenues by which to alleviate student financial burdens, increase college affordability, and enable more students to feel like they belong and can succeed at our universities. The goals and work of the task force align with the UT System's student success framework, focused around the three pillars of Finances, Advising and Belonging.

> *OER are free resources that are licensed to allow for revision and reuse. They can be fully self-contained textbooks, videos, quizzes, learning modules, courseware, and more. Use of OER can improve student engagement and success; provide immediate, equitable, and perpetual access to resources; save money for students; and empower educators to maximize flexible, high-quality learning.*
>
> Adapted from the University of Texas at Arlington

Many of the members came to the task force with deep reservoirs of knowledge, practice and understanding about the world of OER. Others did not. Educators arrive at a commitment, even passion, for OER from several different avenues: the creative opportunities to develop, adapt and customize OER for individual course needs; their instant and permanent digital availability to students and instructors; the global movement to fulfill the social justice and equity dimensions of OER; concern for affordability of textbook and other course materials and the impact on students of unchecked increases in the costs of proprietary resources; frustration at the never-ending inflationary cycle of journals and articles for resource-strapped academic libraries and disciplines; a belief in the democratization of knowledge at the origins of Open Education, Open Scholarship, Open Data, Open Science, among others; a belief that equity—in terms of access to and full participation in university life and academics—is an essential component of quality learning environments for students. These factors share elements in common and members of the task force, to varying degrees, value them also.

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[1] The task force's web resources include several working definitions for OER, and the text box includes a definition adapted from UT Arlington. The Texas Education Code, Section 51.451, defines OER as "a teaching, learning, or research resource that is in the public domain or has been released under an intellectual property license that permits the free use, adaptation, and redistribution of the resource by any person. The term may include full course curricula, course materials, modules, textbooks, media, assessments, software, and any other tools, materials, or techniques, whether digital or otherwise, used to support access to knowledge" (SB 810).

About the Task Force

Background

The UT System Affordable Learning Accelerator Task Force was convened in April 2019 to support and accelerate institutional efforts to expand the availability and affordability of high-quality, low- or no-cost, cutting-edge and new-generation instructional and learning resources to students.

The task force also focused—in terms of its membership, analysis and recommendations—on the UT System's eight academic institutions, where the majority of the System's students are enrolled, the majority of textbooks are purchased, and the majority of OER innovation is taking place.

Charge

Drawing on the leadership and expertise of faculty, students, staff and administrators from across the UT System, the Task Force was convened to:

- Elevate awareness of, and deepen engagement with, existing high-quality Open initiatives, in the UT System, across Texas and with other states, with a particular focus on Open Educational Resources (OER);
- Identify strategies and collaborative opportunities to expand the adoption and development of affordable and next-generation learning resources, including OER, existing library-purchased materials, low-cost business models that remove barriers to affordability, and other affordable resources across UT institutions, in Texas and nationally;
- Assess and identify mechanisms for monitoring current and potential ROI of such efforts across the System;
- Evaluate and identify metrics to assess the impact of OER and other affordability measures on student success outcomes; and
- Identify funding opportunities to amplify the work on behalf of students across the UT System and Texas.

The task force focused broadly on financial well-being as critical to student success and engagement, and was mindful throughout its deliberations of quality, equity and inclusion as core values of the UT System, as well as faculty authority over the curriculum and decision-making about course materials and learning resources.

Timeline

The task force began its work in April 2019, with the expectation that its report would be completed in late summer 2020.

There have been four in-person meetings to date: April 2019, August 2019, November 2019, and February 2020. The task force met additionally via Zoom and/or Teams on October 14, 2019, and June 11, August 20 and August 25, 2020. Additional phone and Zoom meetings were held by the co-chairs, working groups and sub-working groups throughout this time period.

The pandemic necessitated some pause in the task force's momentum and curtailing of its planned scope of work. Planned surveying of institutions regarding the use in high-enrollment courses of certain commercial publisher products (including automatic purchasing programs, sometimes called "Inclusive Access," and access codes for homework platforms) was canceled, as was follow-up on surveys sent to campus bookstores.

Membership

Task force members included academic leaders, library directors, faculty from the universities, as well as representation from key stakeholder groups such as the UT System Faculty Advisory Council (FAC), the UT System Academy of Distinguished Teachers, the Student Advisory Council (SAC), and the UT System Advisory Committee on Library Affairs. With the exception of the stakeholder groups, members were identified and appointed by their provosts.

Most members came from the academic institutions, in recognition that the System's eight universities enroll 225,000 students, of whom more than 175,000 are undergraduates, compared to 15,000 students enrolled at the six health institutions, of whom approximately 2,500 are undergraduates. The health institutions were represented by a faculty member from UT Medical Branch at Galveston (also one of the FAC members), a graduate student from UT Health Science Center San Antonio (until he graduated), and *ex-officio* member Patrick Francis, Associate Vice Chancellor for Health Affairs.

The task force was chaired by Dean Hendrix, Dean of Libraries at The University of Texas at San Antonio, and Rebecca Karoff, Associate Vice Chancellor in the UT System Office of Academic Affairs.

Report Plan

The task force's plan was always to develop a written report to present first to the Chancellor, and then to other System and institutional leaders. The written report includes an executive summary, background and context, key findings, and recommendations. Each recommendation includes rationale and context. The report and recommendations target the academic institutions, although the health institutions are invited to engage, as relevant.

Additional content developed by the task force will be housed on a website, designed to supplement understanding and guide implementation of the recommendations. The website will serve as an information hub, and include guidelines, strategies, and best practices for greater engagement with OER and other low-cost learning resources. *Appendix A* contains an outline of the website.

Key Findings

Following are the key findings arrived at by the task force in the course of its exploration, analysis and deliberations:

- The opportunity is **<u>now</u>** for investing in a strategy to develop and implement no-cost and low-cost learning resources in the UT System.
- Studies show that Latinx and Black students face economic barriers more acutely than other groups attending college. As a result, these students are more likely to financially support their families, take out loans to finance their educations, and hold more student debt than their classmates.
- Surveys of college students indicate they will go to great lengths to avoid paying for costly course materials, including putting off certain courses in their degree sequence, and going without course materials altogether. Without the resources to complete their coursework, student success outcomes—retention rates, graduation rates and workforce preparedness—suffer.
- OER have a role to play in lowering the cost of higher education, promoting equity, improving student success indicators, and stoking curricular innovation within the UT System.
- Open Education is complex and rapidly evolving, at UT institutions, in Texas, nationally and internationally. Nationally, significant investments have been made in Open Education by state governments (e.g., New York, California, Georgia, and Maryland), as well as university systems like the University of California System, SUNY, and CUNY.
- Current OER initiatives in the UT System have been driven by the individual institutions independent from one another. Due to the grassroots origins of these programs, each campus has different oversight mechanisms, investments, methods of assessment and strategies. Those UT institutions with greater OER activity and infrastructure in place have had both resources (financial and human) and leadership to build capacity. Despite marked progress, this is not possible for the System's smaller and less resourced universities without external support. The size and resource capacity of UT institutions, and additional support required for smaller institutions, should be of paramount concern in the implementation of recommendations.
- According to a 2019 THECB survey[2], most UT System institutions reported that their OER efforts were in a nascent phase. Five institutions reported supporting OER

SNAPSHOT OF UT SYSTEM STUDENTS, FALL 2019

- PERCENTAGES OF UNDERGRADS RECEIVING PELL RANGE FROM 23.1% AT UT AUSTIN TO 62.6% AT UTRGV
- PERCENTAGES OF UNDERGRADS RECEIVING NEED-BASED GRANT AND SCHOLARSHP AID RANGED FROM 31% TO 89%.
- HISPANICS REPRESENT 42% OF UT SYSTEM'S TOTAL ENROLLMENT, WITH WHITES BEING THE NEXT HIGHEST AT 27% AND AFRICAN AMERICAN'S AT 7%
- 55% OF UNDERGRADS ARE COUNTED AS HISPANIC OR AFRICAN AMERICAN
- 2018 DATA: HISPANICS ACCOUNTED FOR ROUGHLY 88% AND 80% OF STUDENTS AT UTRGV AND UTEP, RESPECTIVELY

SOURCE: UT SYSTEM OFFICE OF INSTITUTIONAL RESEARCH & ANALYSIS

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[2] Open Educational Resources (OER) in Texas Higher Education, 2019, an independent survey commissioned by the Digital Higher Education Consortium of Texas (DigiTex), in collaboration with the Texas Higher Education Coordinating Board (THECB), and the Institute for the Study of Knowledge Management in Education (ISKME).

programs, though the levels of activity varied greatly. Activities within the UT System included offering training, faculty support, OER curation, websites promoting OER adoption, and campus advocacy. Two institutions reported having formal policies and procedures regarding OER.

- UT System faculty awareness of OER remains low, as evidenced by the recent statewide THECB survey and national surveys. UT institutions reported an OER adoption rate of less than 10% in their courses or did not know their adoption rate.

- There is current momentum within the UT System to embrace Open Education. The UT System and its institutions will be joining the Texas Libraries Coalition for United Action Contract to negotiate with publishers like Elsevier in the area of scholarly resources. Nationwide, similar actions of higher education institutions like the University of California System, the SUNY and CUNY Systems, MIT and Carnegie Mellon reflect this trend.

- The timing for ramped-up engagement with OER UT Systemwide is right:
  - The UT System's Student Advisory Council (SAC) has advocated for OER for the past few years and included a letter of support to the task force in its recommendations to UT System leadership in May 2020 (*see Appendix B*);
  - In its last two sessions, the Texas Legislature has recognized the value of OER in making education more affordable for students, schools, colleges and universities through statute and funding;
  - In accordance with the Legislature's actions and funding, the Texas Higher Education Coordinating Board is supporting OER development through the creation of a statewide repository, or microsite, and a grant program; and
  - Texas Governor Abbott named OER development to be included in the GEER funds[3] he is making available for Texas higher education institutions.

- COVID-19 has brought into sharp relief the need for, and benefits of, OER, described in two statements disseminated across the UT System by the task force in July 2020 (see *Appendices C* and *D*).

- UT System and institutions do not have a unified strategy on how to work with commercial publishers and vendors regarding learning materials.

- Commercial business models and products, such as those known as "Inclusive Access" and "Access Codes," have the ability to reduce educational costs and provide consistent access to quality learning materials. However, these business models have the potential to replicate the same structures that led to high prices in the first place, i.e., collecting and selling student data, limiting student choice to opt out of automatic purchasing programs, limiting students' access to content (e.g., limits on printing, limits on types and number of devices, expiration of access to content), and price increases built into contracts.

- The players and agents involved in working with commercial publishers and vendors include bookstores, libraries, academic departments and individual faculty, a situation which contributes to a lack of understanding and coordination of where, and how best, to ensure cost-savings to students and institutions.

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[3] In July 2020, Texas Governor Greg Abbott announced additional investment to Texas post-secondary students and institutions, totaling $175 million, available through the Governor's Emergency Education Relief Fund, and subsidized by the Coronavirus Aid, Relief, and Economic Security (CARES) Act. Ten million ($10M) is dedicated to strengthening online learning, including development of OER.

Task Force Recommendations

The task force arrived at a set of recommendations that seek to support UT institutions and students in navigating the complex and dynamic learning resources environment summarized in the key findings.

Overarching Recommendation: The UT System should invest in OER through a commitment to a 3-year OER Momentum Strategy.

Rationale

- The 3-year OER Momentum Strategy entails leveraging and amplifying the remarkable commitment and leadership of UT institutions, most of which are already embarked on capacity-building and greater commitment to Open Educational Resources, including through dedicated financial investment. (See *Appendix E* for signature OER projects at UT institutions).
- The OER Momentum Strategy:
    - invites a move from individual interventions to a more holistic, sustained and coordinated approach requiring shared responsibility and broader advocacy;
    - embraces innovation, in support of the UT System's growing strength in online educational delivery, adaptive learning, and new-generation learning modalities and resources; and
    - requires multiple investments, including financial.
- The task force recognizes both the aspiration and the sensitivity inherent in this recommendation, as well as the difficulty of committing to financial investment in an era of fiscal uncertainty with declining state support, institutional revenue losses, additional threats to institutional business models through enrollment volatility and pandemic-related disruptions to academic and operational continuity, and required budget-cutting.
- It asks for commitment of people's time and efforts in an environment with reduced staff, additional responsibilities generated by COVID-19, and many important institutional priorities and initiatives.
- Nonetheless, making a sustained and coordinated commitment to OER is designed to make UT System degrees more affordable for students.
- Removing financial barriers to student success constitutes action on the System's commitment to equity and inclusion.
- With its shared vision, proposed metrics, communication and dissemination plans, backbone support from the UT System, and set of mutually reinforcing activities, the OER Momentum Strategy is designed to result in greater collective impact and culture change benefiting students at all 14 institutions.

Individual Recommendations

The 3-year OER Momentum Strategy includes ten (10) distinct recommendations, enumerated below.

The task force recognizes that some UT institutions have done and/or are already doing elements of what is proposed in the recommendations. The task force also recognizes that not every UT institution will adopt all of the recommendations in the momentum strategy, that institutional governance and other stakeholder groups will need to review and—in some cases—approve adoption of recommendations, and that implementation will take time for many of them. Some of the recommendations are more aspirational than others, some more resource-intensive, and for the System's smaller institutions, they will be heavy lifts. Task force members had clear consensus on many, as well as robust debate on the intent and the wording of several, of the recommendations below.

The recommendations that follow are designed to be customizable by each UT institution, according to institutional context, culture, resources, and needs. They are not mandates.

Guidelines, best practices and other deliverables referenced in the recommendations can be found on the Affordable Learning Accelerator Task Force website.

Recommendation 1: The UT System and institutions should make a financial investment in OER through:

    a. Institutional allocations of funding to OER capacity-building with a focus on faculty and libraries – building on work already underway; and/or

    b. Funding from the UT System Board of Regents for OER at institutions to include in-kind contributions from institutions; and/or

    c. Pursuit of Texas GEER funding being made available to the THECB in support of OER and other new-generation, online learning resources, as well as other governmental and philanthropic funding opportunities.

Rationale

- It is important to note that while OER are free to students, they are not free to develop and support. OER require resources in terms of money, people and time. Infrastructure is needed to support their ready availability and access to students, faculty and disciplines.
- University systems and states with the most OER activity—thereby generating the most ROI to students and institutions—have made progress because of financial commitments from a variety of sources, including state funding.
  - Examples include the New York Legislature making $16 million available to the SUNY and CUNY Systems over several biennia; state funding of Affordable Learning Georgia, implemented by the University System of Georgia; the State of California has funded OER development and adoption at the University of California System, the California State University System, and the California Community College System.
- Given the nationally recognized OER leadership at UT Arlington and UT San Antonio, and the emerging focus of OER at UT Austin, UT Rio Grande Valley and UT Tyler, among others, the UT System is poised to see dramatic gains in lowering educational

costs to students, providing options for high-quality, mostly digital textbooks and course materials.

- Task force members aspire to making the UT System and institutions a leader in Texas and the country.
- This requires UT System investment and support to all institutions to increase the use and development of OER, especially for the smaller institutions.
- Investments in OER infrastructure may include faculty buy-outs to create OER content, hardware and software needed to increase OER usage.
- Recognizing the role OER play in improving affordability and contributing to student success, the Texas Legislature has passed legislation and committed funding in its last several sessions to advance OER statewide, in K-12 and higher education.
- The Legislature and, more recently, the Governor, through Texas GEER funding, have allocated funding to the Texas Higher Education Coordinating Board (THECB), which is playing an increasingly active and critical role in setting up infrastructure and seeding OER adoption and creation through its grant programs.

Recommendation 2: The UT System and institutions should adopt an Affordability Mindset across the UT System.

Rationale

- While this recommendation is not about OER, it is grounded in the financial realities of students at UT institutions, and made in fulfillment of the task force's overarching mission and focus on affordability as it pertains to other areas of student access, enrollment, persistence and completion.
- It is influenced by the December 2017 Report of the UT System Finances Affinity Group, and—more recently—the 2019-2020 UT System Student Advisory Council (SAC), which issued recommendations to Chancellor Milliken on transparency of projected and actual tuition and fee charges, student input into the tuition-setting process, and OER.
- UT institutions are keenly focused on affordability and, in recent years, have made great strides in providing students with as much aid as possible to cover tuition and fees, as well as other costs of attendance.
- Yet, tuition and fees represent 35%-40% of the cost of attendance at UT System institutions, and many students at UT institutions remain challenged to pay for their educations, with financial need cited as one of the top reasons students leave the university and do not complete their degrees.

- COVID-19 has exacerbated these conditions and adoption of an affordability mindset amplifies and elevates the identification of additional funds for scholarships and grants, and the commitment to covering the educational costs for students in lower income brackets by UT institutional leadership.
- This recommendation also recognizes that affordability for UT System students takes place across a continuum, determined by multiple factors including, but not limited to, tuition and fees; costs of learning resources (textbooks, homework and problem sets, e.g.); required technology (devices, broadband and service); food, housing, and transportation; costs of specific majors and degree programs; family income and EFC; grants and financial aid; loans and debt.

> COVID-19 HAS CAUSED FINANCIAL SUFFERING TO STUDENTS AND THEIR FAMILIES, MAKING FINANCIALLY VULNERABLE STUDENTS EVEN MORE SO AS—OVERNIGHT—THEY AND FAMILY MEMBERS LOST JOBS, INCOMES AND HEALTH BENEFITS.
>
> THE PANDEMIC HAS UNDERSCORED THE DIGITAL DIVIDE, FURTHER COMPLICATING HOW, WHEN AND WHERE STUDENTS CAN MAKE ACADEMIC PROGRESS. AND, IT HAS EXACERBATED INCOME, RACIAL AND ETHNIC INEQUITIES, WHILE SIMULTANEOUSLY EXPOSING THOSE INEQUITIES IN WAYS THAT WERE PREVIOUSLY EASY TO IGNORE.
>
> STUDENTS EVERYWHERE, INCLUDING THOSE IN THE UT SYSTEM, FACE ADDITIONAL—AND OFTEN LESS VISIBLE—FINANCIAL BARRIERS TO SUCCESSFULLY PURSUING THEIR EDUCATIONS, INCLUDING FOOD AND HOUSING INSECURITY.
>
> THE PANDEMIC HAS CREATED GREATER URGENCY FOR UT INSTITUTIONS TO KEEP STUDENT FINANCIAL WELL-BEING AND AFFORDABILITY AT THE CENTER OF FUTURE PLANNING AND DECISION-MAKING.
>
> SOURCE: *STATEMENT IN SUPPORT OF OPEN EDUCATIONAL RESOURCES (OER) IN THE FACE OF COVID-19 FROM THE UT SYSTEM AFFORDABLE LEARNING ACCELERATOR TASK FORCE*

- An affordability mindset represents action that is both symbolic and tangible, defining clear roles and actions to be taken by students, institutional and System leadership, as well as faculty and staff across all units of the institution.
- The task force proposes key components and actions to help institutions adopt an affordability mindset, many of which are already in practice at various UT institutions, and which should include:
  - Common values and approaches that are Systemwide, along with those that are customizable by each UT institution with respect to their students, contexts and cultures;
  - Guidelines (where lacking) for clear communication to students by institutions on cost of attendance, financial aid and loans;
  - Guidelines, policy clarity and adherence, and best practices around course-related fees;
  - A toolkit comprised of strategies to remove affordability barriers in addition to resources and practices that place student affordability front and center; and
  - An affordability campaign that highlights data, captures student voices and concerns, and builds institution-wide awareness of the financial realities and barriers students face.
- The Affordability Mindset should communicate that understanding and meeting the financial needs of students is a shared responsibility by all members of the university community.

Recommendation 3: The UT System and institutions should assess OER impact on return on investment (ROI) to students and institutions, learning outcomes, student success outcomes, and student and faculty satisfaction based on common assessment standards.

Rationale

- Evidence and data are largely missing on a number of important fronts critical to assessing the impact of OER.
- The task force identified the need for a multi-pronged, holistic assessment of OER impact.
- The task force agreed that certain common assessment standards will be valuable in developing and implementing a Systemwide OER strategy.
- The task force has developed preliminary assessment standards. Further input into these assessment standards will be needed from institutions.
- UT System should provide support to smaller institutions in conducting these assessments.
- For those institutions that track it, ROI on OER is significant, both to students and institutions.
- Using different assessment methodologies, several UT institutions have been tracking savings to students.
    - For example, UT San Antonio has saved students over $8,000,000 since 2016 using a methodology that projects student savings using the actual costs of previously used proprietary textbooks for specific courses (ROI_{Actual}) over four semesters.
    - By contrast, UT Arlington uses a methodology that calculates savings using an average textbook price ($ROI_{Average}$). As a result of the differing methodologies, UT Arlington estimates savings to students of $2,200,460.
    - UT Rio Grande Valley estimates savings to students of approximately $180,000 from its OER adoption grant program over three semesters and fourteen course sections. In fall 2020, UTRGV will have, for the first time, 50 instructors and over 100 course sections in the zero-cost or low-cost category, with a plan in place to calculate ROI at the end of the semester.
    - UT Tyler is in the initial stages of determining ROI and providing other data related to student use and success of OER materials. Using UT System funded grant monies, UT Tyler faculty authored two OER textbooks required of all undergraduate students working to complete their undergraduate core curriculum requirements.
- The potential return on investment for institutions through increased enrollments, retention and graduation enabled by reduced cost of attendance is also meaningful, particularly so amid the uncertainty caused by COVID-19.
- Research on the curricular use of OER shows evidence of positive impact on student learning and success, and on student and faculty satisfaction.

Recommendation 4:   The UT System and institutions should adopt a coordinated approach to increasing the use and development of OER homework sets and test bank questions, platforms and infrastructure across the UT System.

Rationale

- The overall topic of ancillary course materials, above all homework sets and test bank questions and the platforms required to access them, generated the most discussion and debate among task force members throughout its convening, resulting in Recommendations 4 and 5.
- The lack of availability of OER textbook "extras" was identified in the THECB/ISKME survey as a major barrier to OER adoption in the UT System and statewide.
- While there are more open textbooks available to faculty than ever, that is less true for open homework sets and test bank questions, in particular in STEM and business disciplines, making proprietary options the default.
- The task force believes open homework sets are particularly important content to produce and share systemwide, and beyond. One of the task force co-chairs has discussed with her system counterpart at Texas A&M the attention needed and opportunities for collaboration, including by disciplines, to develop more robust open homework and test questions.
- Content is one part of the equation; platforms are another.
- The task force recognizes the desire for homework platforms that automate grading and provide ample practice opportunities for students. While commercial vendors provide some solutions, including lower-cost propriety platforms that utilize OER behind a paywall, there is a wide range of other options that can support this need, including locally or externally hosted open-source platforms, most learning management systems, and plug-ins that integrate interactive assessment into OER publishing platforms.
- The task force has identified a number of steps to increase access to open-source content and platforms:
  - Investments should be made to enable UT institutions to share their platform solutions, best practices, pedagogical innovations, latest research and newly created OER.
  - Institutions should assign responsibility to a unit or advisory committee to govern OER on their campuses, including ancillary course materials.
  - The task force recommends a feasibility study of negotiating Systemwide licensing agreements with vendors that support OER development and implementation.
  - The task force recommends that UT System and institutions engage with an emerging statewide infrastructure that includes tools and systems for locating and sharing OER.
  - Task force member Michelle Reed (UT Arlington) worked with the Texas Higher Education Coordinating Board on the development and launch of its new OER Commons microsite required by HB 3652. This is an important advancement in fulfilling the goals in this recommendation. The site, OERTX, launched on September 1, 2020.

Recommendation 5: The UT System and institutions should adopt a coordinated Systemwide approach to educating students, faculty, staff and administrators about proprietary course materials published and sold by commercial publishers and vendors. Proprietary course materials may include, but are not limited to, automated purchasing programs ("Inclusive Access"), access codes for homework platforms, online bundled course materials or curriculum packages, automated grading software, and new print textbooks.

Rationale

- Adopting a coordinated approach focused on educating UT institutional communities about proprietary course materials entails action, as well as building awareness.
- The task force developed a set of guidelines with recommended actions and best practices that include:
    - Tracking usage of these products;
    - Identifying advantages and disadvantages of various proprietary content platforms;
    - Monitoring the quickly evolving learning resources market and business models;
    - Determining the ROI and impact of these platforms to students and institutions; and
    - For those institutions interested in doing so, decreasing reliance on proprietary content.
- The task force also developed preliminary guidelines on negotiating Systemwide licensing agreements with proprietary publishers and vendors.
- Commercial publishers and vendors have developed quality course materials that both save students money compared to traditional textbooks, and meet the needs of faculty, especially those in STEM and business disciplines.
- This recommendation affirms a commitment to faculty governance, academic freedom, faculty authority over the curriculum, discipline-specific needs, and institutional autonomy.
- It also asks institutions to understand concerns with proprietary course materials identified by students, faculty and administrators, research and public interest groups, as well as OER advocates, including concerns around data privacy, student agency and choice, and limits on student access to content.
- Institutions should assign responsibility to a unit or advisory committee focused on developing an informed approach.
    - UT Arlington has taken an intentional approach to monitoring "Inclusive Access" and "Access Code" business models and products, with the goal of decreasing usage, as part of the university's strategic focus on student financial well-being and commitment to OER.
    - UT Austin also has an intentional approach that includes the purchasing of an "Inclusive Access" platform meant to decrease commercial prices and that is able to promote and include OER course materials. The approach includes communication to faculty about the range and costs of options available to them and their students, while preserving faculty decision-making.

Recommendation 6: The UT System and institutions should recognize faculty OER engagement in tenure and promotion policy and/or guidelines.

Rationale

- The task force holds as a core value the faculty's authority over the curriculum and decision-making on textbooks and other course materials.
- The task force also recognizes that tenure and promotion decisions are made locally by departments and colleges.
- Nonetheless, within the longstanding and existing framework of granting tenure and promotion, the task force believes that creation and adoption of OER represent new models of scholarship, teaching and service that may not be well understood by the faculty and administrators charged with making tenure and promotion decisions.
- While many UT institutions, colleges and departments have expansive tenure and promotion policies, there can still be a mismatch between policy and practice for new-generation kinds of faculty work, especially coming from newer faculty members working in increasingly digital environments.
- Led by the task force's two FAC members, this recommendation draws from emerging practice at other universities and systems, and is designed to help evaluate and incentivize inclusion of faculty engagement with OER as recognized forms of scholarship, teaching and service.
- Several task force members are part of a collaborative called Driving OER Sustainability and Student Success, DOERS3. DOERS3 has taken a deep dive into reviewing T & P policy and practice across the US and Canada.
  - In coming months, the DOERS3 Collaborative will issue guidance to faculty going up for tenure and promotion review, as well as those making decisions, on the variety of ways in which OER contributions can be recognized and valued as research, teaching and service.
- Implementation of this recommendation includes working with the UT System Faculty Advisory Council and institutional governance groups to reexamine, as appropriate, tenure and promotion policy.
- It is aligned with institutional revisions to their workload policies, in conjunction with Regent Rule 31006, the UT System Workload Policy, amended in 2017, and FAC-developed *Guidelines for the development and approval of institutional faculty workload and reporting policies*.

Recommendation 7: UT institutions should commit to integrating OER into courses in the Texas Core Curriculum, supported by the Texas Higher Education Coordinating Board's OER grant program and OER Commons microsite, and inspired by *Z-Degrees* (*zero-textbook-cost* associate degrees) at the community colleges.

Rationale

- OER textbooks and ancillary course materials tend to be more widely available in introductory courses (including general education and core curriculum courses) than in upper-division courses, although this is less true for STEM disciplines.
- The task force has learned from community colleges in Texas and across the country that have implemented zero-textbook-cost degree programs, known as Z-Degree Programs. A Z-Degree Program is a set of courses in a specific program area that allows a student to earn a credential, most often an associate degree or program

certificate, with zero textbook costs and through the use of OER or other materials provided to students free of charge.

- While Z-degree programs are not realistic for UT institutions with missions centered on baccalaureate degree completion, the multiple benefits of OER to students would be amplified if more UT institutions integrated OER into their Core Curriculum and high-enrollment courses.
- As is true for all the recommendations in this report, such integration will take resources—human, financial and infrastructure.
- The THECB's OER Grant Program funds faculty development of OER in Texas Core Curriculum Courses (TCC).
- Aspiring to scaled integration of OER in TCC and high-enrollment course serves as an important contributor to accelerating momentum on OER across the System, addressing student financial well-being, and improving degree completion for not only first-time-in-college (FTIC) students but also the significant numbers of transfer students who swirl in and out of 2- and 4-year institutions, often driven by financial reasons.

Recommendation 8: The UT System and institutions should adopt best practices for complying with state and federal legislation regarding OER and course material disclosure.

Rationale

- The task force developed a set of effective practices for compliance with Texas law (SB 810), which requires course markings and a searchable engine for students to identify courses using OER in the course schedule and registration system.
- This guidance delineates some of the key challenges, and identifies concrete action steps and resources to aid institutions in fulfilling the law's resource-intensive requirements.
- UT Arlington has particular expertise in course markings.
- UT System should provide support to smaller institutions in complying with the current law's resource-intensive requirements.

Recommendation 9:   The UT System and institutions should develop an ongoing OER legislative strategy, including one that might involve collaboration with other Texas university systems and educational partners.

Rationale

- This strategy should not interfere or compete with institutional legislative agendas.
- The task force recommends that UT System should provide support and engagement from the UT System Office of Governmental Relations.
- This recommendation supports the overarching OER Momentum Strategy and individual UT institutions that have expressed interest in pursuing additional funding and support from the Texas Legislature.
- It is also designed to support and maintain the Governor and Legislature's recognition that OER are a part of the solution in addressing higher education affordability.
- The Texas Legislature has addressed and invested in OER in the last two biennia through the following bills: SB810 (2017), HB 3650 (2019), and HB 3652 (2019).

Recommendation 10: The UT System Chancellor, in consultation with institutional leadership, should appoint a follow-up UT System group or council to support, enhance and oversee the 3-year UT System OER Momentum Strategy.

Rationale

- If adopted, the UT System 3-year OER Momentum Strategy requires an appointed group to oversee and support implementation.
- Too many important initiatives have seen their impact diminished because there is no entity responsible and accountable.
- Conditions essential to implementation include the shared vision put forth in this report, along with the proposed metrics, communication and dissemination plans, backbone support from the UT System, and sets of mutually reinforcing activities.
- These conditions are delineated in this report, and further fleshed out by the resources, analysis, best practices and guidance housed on the task force website, in what amounts to an *OER momentum capacity-building plan*.

Additional Considerations

Allied Endeavors

The task force has participated in, and benefited from several allied endeavors and collaborations, in Texas and nationally. The initiatives underway by these entities and partners—many of them focused on Open Education and Scholarship—complement and supplement the task force's work, findings, recommendations and deliverables, as well as fill in gaps for work the task force was not able to undertake because of capacity and COVID-19 reasons. Highlights include:

- The *Digital Higher Education Consortium of Texas*: Known as DigiTex, the consortium's mission is to "assist Texas community colleges in providing learners an education without barriers through high quality digital educational opportunities, resources, and services that help students succeed."
  - DigiTex operates under the auspices of the Texas Association of Community Colleges and serves all 50 public community college districts in Texas.
  - In August 2020, DigiTex launched *Texas Learn OER*, a set of openly licensed, self-paced online learning modules designed to deepen understanding, usage and creation of OER by faculty, staff and administrators. These resources will be critically helpful for UT System faculty and staff as they deepen their engagement with OER.
- *The Texas Library Coalition for United Action* (TLCUA): In August, 2020, the UT System joined the TLCUA, formed to conduct consortial negotiations of academic journal contracts and improve access to faculty research.
  - Joining the coalition represents a commitment to affordability and Open Education and Scholarship. In addition to reducing costs of journal subscriptions for institutions and libraries, critical goals of the coalition include retaining author control of scholarship and advocating for an open dissemination role by authors' academic institutions and libraries.
- *DOERS3 (Driving OER Sustainability for Student Success)*: Several task force members are active in DOERS3, a national collaborative of university systems and associations committed to sustaining and scaling OER.

- o The work of DOERS3 has taken place concurrent to that of the task force.
- o Featured projects include an OER Equity Blueprint; recommended ways to recognize OER contributions in tenure and promotions practice and policy; recommendations for improved relationships with academic bookstores as partners in the support of OER; and development of a research agenda to better measure impact of OER on student learning and success.
- UT institutional engagement with the Open movement is manifest in multiple ways, including through membership and participation in *Open Stax* (one of the nation's premiere OER repositories at Rice University), the *Open Education Network* (promoting access, affordability and student success through the use of open textbooks as part of the University of Minnesota's Center for Open Education), and the *MIT Open Framework* (a principle-based framework to guide negotiations with scholarship publishers).

UT institutions and System will continue to build on, coordinate and leverage their OER momentum engagement with these partners.

Affordable Business and New-Generation Strategies and Resources

Part of the task force's original charge was to identify strategies and collaborative opportunities to expand the adoption and development of "next-" or "new-generation" teaching and learning tools, as well as affordable learning resources. These resources comprise digital innovations like augmented and virtual reality (AR and VR), among a growing set of other technologically sophisticated tools developed by a variety of providers with differing business and user models. The task force was unable to focus deeply on the role and potential of AR and VR in transforming the teaching and learning environment. Many UT institutions, both academic and health, are leading some transformative work in this arena, and at the November 2019 meeting, task force members enjoyed a VR demonstration from member Nikos Vasilakas and a colleague from UT Medical Branch at Galveston (UTMB). UTMB has taken a more intentional approach to advancing VR and AR.

Admittedly, AR and VR are expensive and, therefore, seem at odds with the purview of the task force's focus on *affordable* learning. Yet, the task force recognizes their potential and, as these technologies increase their presence in all aspects of our lives, AR and VR have a role to play in making learning open. Moving forward, UT academic and health institutions and/or the UT System may want to consider convening an exploratory or advisory group to investigate broader and deeper engagement with AR and VR and their emerging role in how teaching, learning and research are conducted across the UT System and in the context of the future of work.

Conclusion

The UT System Affordable Learning Accelerator Task Force respectfully submits this report to Chancellor J.B. Milliken in the hope that its recommendations will be endorsed, providing a clear pathway for UT institutions to accelerate momentum on OER. The task force recognizes the aspirational nature of many of the recommendations, both because of the financial and human resources required to implement them and the culture change entailed in implementing others. Yet, UT institutions are poised to take leadership roles by integrating OER more intentionally into how the academic enterprise works. The task force wants the UT System to take its place with peer systems in engaging more deeply with OER and building capacity so that all UT institutions are viewed as national leaders. This deeply held goal is not a matter of prestige but,

rather, made in support of an abiding commitment to support UT System students, their success, and the affordability of the educations offered at UT institutions.

Indeed, the work of the task force over 16 months—ultimately defined and solidified by the disruptions caused by COVID19—revealed the extent to which faculty, staff and administrative leaders are passionate about the potential of OER to keep student affordability at the heart of the educational enterprise; deepen the commitment to equitable student access to, persistence through, and completion of degrees; assure quality as a constituent component of equity; and honor faculty governance, academic freedom and faculty authority over the curriculum. Led by UT institutions and supported by the UT System, the task force believes its recommendations can contribute forcefully to all these priorities, and that there is no better time than now.

IV. Appendices

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Appendix A

Accelerating Momentum on Affordable Learning in the UT System

A Deliverable of the UT System Affordable Learning Accelerator Task Force

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Website Outline

The *Accelerating Momentum on Affordable Learning in the UT System* website serves as an information hub, designed to motivate greater engagement with OER and other low-cost learning resources by UT faculty, administrators, staff and students.

The website also serves as the repository for the recommendations from the UT System Affordable Learning Accelerator Task Force, convened between April 2019-August 2020. Along with implementation guidelines, strategies and best practices, it features OER work at UT institutions, and houses analysis of research, topical briefs, an inventory of resources, and other supplemental material and information developed by the task force.

N.B. The UT System Affordable Learning Accelerator Task Force's Web Report is currently under construction and not visible to the public, pending UT System Chancellor approval of the task force's written report and recommendations.

This mock-up provides a sense of the website landing page. Please note, the text and sidebars are placeholders and will be revised.

A rotating carousel will link to key deliverables: The World of OER inventory of resources; An Introduction to Accessibility in Online Course Materials; OER at UT Institutions; Adopting an Affordability Mindset, etc.

Appendix B

THE UNIVERSITY *of* TEXAS SYSTEM
FOURTEEN INSTITUTIONS. UNLIMITED POSSIBILITIES.

SAC
Student Advisory Council
sac@utsystem.edu
WWW.UTSYSTEM.EDU

TO: Members of the Affordable Learning Accelerator Task Force

FROM: The U. T. System Student Advisory Council

DATE: April 27th, 2020

RE: Support for the Adoption of Open Educational Resources and Other Textbook Affordability Measures

In 2018, the U. T. System Library Directors proposed the formation of the U. T. System Textbook Affordability Advisory Council Task Force to engage in a strategic plan focusing on high-impact textbook affordability strategies that enhance student financial well-being and success. The U. T. System Student Advisory Council commends the Task Force for their efforts and work to help students overcome financial barriers related to purchasing costly learning materials on top of their tuition and fee charges.

The U. T. System Student Advisory Council has been working on reviewing student concerns related to affordability at their respective campuses. As you may suspect, students continue to express serious concerns about the barriers to success posed by costly learning materials, including traditional textbooks and online access codes. However, through our research we were encouraged to learn that all eight academic institutions have already begun implementing open educational resources (OER) in one or more of their programs/courses. We were also heartened to learn that other courses have incorporated affordable learning materials that are available at significantly discounted rates. We offer the following student testimonials to support and strengthen your work.

> *"I was first introduced to open source textbooks, specifically OpenStax, when I was attending Northwest Vista College for my science classes and UTSA for my Generating Educational Excellence in Math and Science class (now known as UTeachSA) in the Spring of 2016. My chemistry professor used OpenStax as the class textbook, and I felt I really benefited from using it in multiple ways such as academic and financial. Using open source textbooks promotes equity among students as they can be accessed through personal and public computers, smartphones, or even purchased inexpensively as a hardcover textbook. The content, which is written and peer-reviewed by college professors, is on-par (and in my experience, even better than) traditional textbooks. Promoting the use of open source textbooks at UTSA would benefit many students on campus."*

> *Marielle Gaspar, B.A. Physics*

> *"At UTEP we have some really good interdisciplinary programs. One amongst those is Environmental Science and Engineering (ESE). Being an interdisciplinary program, it allows freedom to its student to pick and choose classes/courses that will benefit them a lot towards their research and degree completion. My field of*

research is Atmospheric Physics with focus on planetary boundary layer meteorology. However, unfortunately we don't have a course dedicated to this subject at UTEP. During one of my class, I learned about the OER source called COMET MetEd. This program is part of the University Center for Atmospheric Research's community program. It is a free collection of hundreds of training resources intended for the geoscience community. It's a wonderfully designed platform for students to learn more from variety of fields in Geosciences including Atmospheric Sciences and benefit from the experts who has designed the tutorials/sessions. I have been using MetEd for past two years and it has benefited me immensely in my research. This is a great tool to learn from the experts in the field of Atmospheric and Geosciences free of charge. I managed to find study material in the form of videos, virtual classrooms, PowerPoint slides and at times e-books which helped me make up for the courses that I couldn't find at UTEP."

Nakul N. Karle, Ph.D. Candidate Environmental Science and Engineering

"When I started my education at UTEP as a nursing major, I would be paying anywhere between $75-$200 for my textbooks and my access codes. I would try to look for rentals or used books but the cost defrayal was not much. I switched my major to Political Science, not due to financial reasons, last semester. I immediately noticed that the professors were using open educational resources to teach their classes. Since my switch, I have yet to purchase a book for my classes. The professors are very organized with the way the resources are made available to us and they tailor each to what we are doing in class. If it were not for this, I know many of my classmates would be struggling to excel in our classes. I believe that more professors should be incorporating the open educational resources into their courses to ease the burden of their students and make learning affordable and enjoyable to all."

Jessica Martinez, Undergraduate Political Science Major

The cost of obtaining a higher education degree continues to be an access barrier for students across the nation. Indeed, we continue to see tuition increases across the board. OER provides financial relief to students at U. T. institutions and mediates the impact of rising tuition and fees.

We encourage the Task Force to continue supporting OER efforts and other textbook affordability strategies. Many of us already have noticed increased attention to OER on our campuses, and we are hopeful this will result in meaningful change. Additionally, we encourage the Task Force should keep in mind the primary goal of ensuring that all students, regardless of financial status, have the opportunity to get the best education possible at an affordable rate. As students, we appreciate the effort put in by the Task Force this year and commend the faculty and staff of our institutions who are helping this move forward.

Thank you for your consideration.

Appendix C

Statement in Support of Open Educational Resources (OER) in the Face of COVID-19 from the UT System Affordable Learning Accelerator Task Force (7/7/20)

Shared with UT System and institutional leadership, faculty and staff

The ALA Task Force and OER

Since April 2019, the UT System Affordable Learning Accelerator Task Force has focused on affordable learning resources for students. The primary area of focus is Open Educational Resources (OER) and how to build institutional engagement and capacity with OER to benefit student learning, success and financial well-being, as well as the affordability of degrees across the UT System. Recommendations will center on how to increase adoption of OER and other low-cost learning resources across the UT System, with emphasis on the academic institutions.

The task force plans to issue its report and recommendations by August 31, 2020. Among the recommendations the task force will issue with its final report will be for the UT System and institutions to adopt an affordability mindset. At the heart of this mindset is a focus on the financial belonging of our students, in support of the System's student success framework grounded in Finances, Advising and Belonging. The task force will recommend a variety of actions including systemwide investment in OER with direction that any investment would have to help students at all UTs, and that faculty and departments partner within and across institutions to develop OER.

Until then, the task force is asking faculty and administrators across the UT System to strongly consider including OER as they plan Fall 2020 courses. There is an opportunity right now for institutions and faculty to adopt OER as textbook options for Fall 2020 and the reasons for doing so are many:

1. **Affordability and Adaptability**: OER solve a textbook affordability problem endemic to higher education, and across UT institutions. OER are free to students. OER are adaptable to modalities and delivery models. OER are customizable by users so that instructors can adopt and adapt them to their pedagogical and course needs. In contrast to the commercial publisher content faculty select, and students purchase each semester, OER are available to students and instructors *immediately and forever*.
2. **Return on Investment**: The return on investment to students in these difficult times is enormous. Over the past few years, UT Arlington estimates savings to students of $2,200,460; UT San Antonio has saved students $8,000,000. The potential return on investment for institutions through increased enrollments, retention and graduation enabled by reduced cost of attendance is also meaningful amid the uncertainty caused by COVID-19.
3. **Digital Access**: Most OER are available digitally, the right solution given the volatility of COVID-19 and in anticipation of many courses being taught online, through hybrid delivery, or needing to pivot again quickly from in-person to remote instruction.

COVID-19's Disruption and Financial Impact on Students

The COVID-19 pandemic engendered significant disruption to the ways in which UT institutions operate, to how, when and where teaching and learning take place, and to how academic resources—including textbooks and libraries—are made available. When UT institutions pivoted to remote instruction almost overnight in March, suddenly everyone needed digital access to learning materials. Library deans and librarians observed an immediate increase in requests by faculty for OER at campuses. Why? Because most OER are already digital, they are free, and they are adaptable and customizable by faculty needing to alter them for their course context and outcomes.

More important than the disruption to operational continuity, the pandemic has caused financial suffering to students and their families, making financially vulnerable students even more so as—overnight—they and family members lost jobs, incomes and health benefits. The pandemic has underscored the digital

divide, further complicating how, when and where students can make academic progress. And, it has exacerbated income, racial and ethnic inequities, while simultaneously exposing those inequities in ways that were previously easy to ignore. In Fall 2019, percentages of undergraduate students across UT academic institutions receiving Pell ranged from 31% to 63%. Percentages of undergraduates receiving need-based grant and scholarship aid ranged from 31% to 89%. Undergraduates account for 78% of students at academic institutions and 55% of those undergraduates are Hispanic and African American.

The high cost of textbooks has been a barrier to student access and success for decades, independent of the pandemic. The 2019-2020 Student Advisory Council wrote the following letter of support to the task force:

> "The cost of obtaining a higher education degree continues to be an access barrier for students across the nation. Indeed, we continue to see tuition increases across the board. OER provides financial relief to students at U. T. institutions and mediates the impact of rising tuition and fees. We encourage the Task Force to continue supporting OER efforts and other textbook affordability strategies. Many of us already have noticed increased attention to OER on our campuses, and we are hopeful this will result in meaningful change. Additionally, we encourage the Task Force [to] keep in mind the primary goal of ensuring that all students, regardless of financial status, have the opportunity to get the best education possible at an affordable rate. "

> *OER* *are free resources that are licensed to allow for revision and reuse. They can be fully self-contained textbooks, videos, quizzes, learning modules, courseware, and more. Use of OER can improve student engagement and success; provide immediate, equitable, and perpetual access to resources; save money for students; and empower educators to maximize flexible, high-quality learning materials in individualized curricula.*
>
> Source: UTA Libraries

Students everywhere, including those in the UT System, face additional—and often less visible—financial barriers to successfully pursuing their educations, including food and housing insecurity. The pandemic has created greater urgency for UT institutions to keep student financial well-being and affordability at the center of future planning and decision-making. Taking advantage of OER—with the availability of no-cost-to-students quality textbooks in so many academic disciplines—becomes not only an opportunity but also an imperative.

OER provide an opportunity *now*
Given the challenges created by the COVID-19 pandemic, the Task Force is issuing this interim statement on the value and utility of OER and the need for OER now more than ever, a need heightened by concerns for student success and financial well-being in the face of the pandemic.

If there was ever a time for a commitment to, greater engagement with, and strategic investment in OER, it is now.

About the UT System Affordable Learning Accelerator Task Force
The Affordable Learning Accelerator Task Force members include academic leaders, library directors, faculty from the universities, as well as representation from the Faculty Advisory Council (FAC) and the Student Advisory Council (SAC). The task force recognizes the authority faculty have over the curriculum, including decisions regarding what textbooks and other learning resources to use in their courses.

Appendix D

A message to UT institutional faculty and instructors from the UT System Affordable Learning Accelerator Task Force – July 2020

REDESIGNING YOUR COURSES?
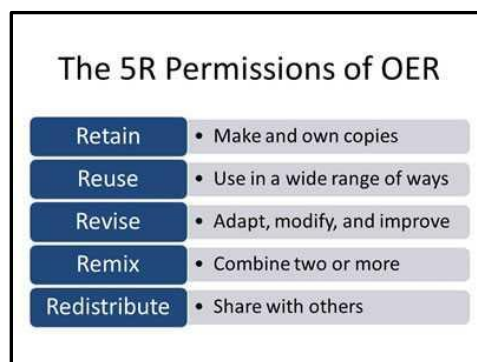**HELP YOUR STUDENTS SUCCEED WITH NO-COST AND LOW-COST COURSE MATERIALS!**
The COVID-19 pandemic has disrupted higher education's instructional models. This summer, many UT System faculty are redesigning their courses to fit new online or hybrid modalities.

This disruption is the perfect time to consider using no-cost and low-cost course materials. Why?

- The pandemic has caused financial suffering to students and their families, especially among our most financially vulnerable students. The pandemic has created greater urgency for UT institutions to keep student financial well-being and affordability at the center of future planning and decision-making.
- Many of these no-cost and low-cost course materials are digital and can be easily integrated into online or hybrid teaching modalities.
- Students are highly satisfied with courses that implement no-cost and low-cost course materials.

No-Cost Course Resources: Open Educational Resources

- Open Educational Resources, or OERs, are digital, free, licensed and customizable by faculty.
- OER remove financial barriers to student success.
- OER empower faculty to customize them so they can easily adopt and adapt them to their pedagogical and course needs. See OER's 5Rs.
- OER can be fully self-contained textbooks, videos, quizzes, learning modules, courseware, and more.
- OER provide immediate, equitable, and perpetual access to course resources.

The 5R Permissions of OER

Retain	Make and own copies
Reuse	Use in a wide range of ways
Revise	Adapt, modify, and improve
Remix	Combine two or more
Redistribute	Share with others

Low-Cost Resources

- UT System Libraries subscribe to thousands of resources (e-books, e-journals, streaming media) that can be used as course materials. Talk to your library about how you can integrate them into your courses.
- Consider lower cost proprietary textbooks

If there was ever a time for a commitment to, greater engagement with, and strategic investment in affordable learning materials, it is now.
Please contact your library or institutional task force members for details on getting started.

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Appendix E

OER at the Institutions: Signature Projects

Below are signature OER projects and initiatives identified by the UT System's eight academic universities and one health institution. The signature projects reflect just a snapshot of the varied ways in which UT academic universities are engaging with OER. More information is available on the task force website.

The University of Texas at Arlington
UTA Student Government OER Outreach Since 2017, UT Arlington Student Government has played an active role in shaping OER outreach and encouraging the use of affordable course content across campus. Student Government representatives have collected data on the impact of course material costs, presented on OER to various audiences, and advocated for price transparency at the UT System level. This video features Katie Gosa, 2017-2018 Student Body President and psychology/history double major at UT Arlington, who presented on OER at TEDxUTA in April 2018. **Link:** https://youtu.be/dUgqdSOD9bg
UTA CARES Grant Program In October 2019, a notable institutional investment in the amount of $500,000 was made to OER efforts at UT Arlington, making it the largest commitment by any public academic institution in Texas. The investment funds the UTA CARES Grant Program that was established by UTA Libraries in 2017 and provides OER adoption stipends and scale and innovation grants to improve student success and college affordability. To date, the UTA CARES Grant Program has funded 28 OER projects impacting each college and school at UT Arlington. One notable project was led by Dr. Habib Ahmari, Assistant Professor in UTA Department of Civil Engineering, who received a UTA CARES Innovation Grant in 2018 to develop an OER for an applied fluid mechanics lab. Dr. Ahmari worked with students to develop instructional videos used in a flipped classroom model, along with a manual and worksheets for ten experiments. *Applied Fluid Mechanics Lab Manual* has been viewed nearly 240,000 times, downloaded approximately 1,500 and adopted at numerous other institutions; the videos have been viewed over 75,000 times on YouTube. In his final report, Dr. Ahmari noted that course grades improved with the transition to OER while the time student spent preparing for class decreased significantly. This OER has saved UTA students approximately $30,000 since it was piloted in Fall 2018. **Link:** https://libguides.uta.edu/OERgrants
The University of Texas at Austin
Center for Open Educational Resources and Language Learning (COERLL) Projects The Center for Open Educational Resources & Language Learning (COERLL) is one of 16 National Foreign Language Resource Centers (LRC's) funded by the U.S. Department of Education. The overall mission of these federally funded centers is to improve the teaching and learning of foreign languages by producing resources (materials and best practices) that can be profitably employed in a variety of settings. COERLL's work is organized around seven basic areas: • Applied linguistic research • Teaching materials

- Language assessment
- Teacher development
- Less commonly taught languages
- K-12 initiatives
- Outreach and dissemination

Link: https://crln.acrl.org/index.php/crlnews/article/view/24482/32321

OER Outreach Working Group

UT Austin Libraries created an OER Outreach Working Group with members from UT Libraries, COERRL, Texas Digital Libraries (TDL), and UT Austin faculty. These partners are an integral part of this group. COERLL works nationally but is located at UT, and as a result of COERLL's work, many of the faculty on our campus who are aware of and have embraced open initiatives are from the languages departments. As we expand campus conversations about OER, we are relying heavily on our partners at COERLL to share experiences and strategies they have used. TDL is a consortium of academic libraries that builds capacity for digital scholarship and supports open access initiatives in higher education. TDL also co-hosted a statewide OER summit for Texas institutions as part of an ongoing interest in spreading information about OER.

Link: https://crln.acrl.org/index.php/crlnews/article/view/24482/32321

The University of Texas at Dallas

The American Yawp: A Massively Collaborative Open U.S. History Textbook

The American Yawp is a collaboratively built, open American history textbook designed for general readers and college-level history courses. Over three hundred academic historians—scholars and experienced college-level instructors—have come together and freely volunteered their expertise to help democratize the American past for twenty-first century readers. The project is freely accessible online at www.AmericanYawp.com, and in addition to providing a peer review of the text, Stanford University Press has partnered with *The American Yawp* to publish a low-cost print edition. Furthermore, *The American Yawp* remains an evolving, collaborative text: you are encouraged to help us improve by offering comments on our feedback page, available through AmericanYawp.com.

The American Yawp is a fully open resource: you are encouraged to use it, download it, distribute it, and modify it as you see fit. The project is formally operated under a Creative Commons Attribution-Share Alike 4.0 International (CC-BY-SA) License and is designed to meet the standards of a "Free Cultural Work."

Joseph Locke & Ben Wright, editors.

Link: http://www.americanyawp.com/

The Digital Yoknapatawpha Project

The Digital Yoknapatawpha Project is a data entry site, built in Drupal, for the Digital Yoknapatawpha Project. Theresa M. Towner is Ashbel Smith professor of literary studies at The University of Texas at Dallas. She has published extensively on Faulkner and on African American literature and theory in *The Faulkner Journal*, *Mississippi Quarterly*, *Southern Quarterly* and other venues. Her books on Faulkner include *Faulkner on the Color Line: The Later Novels*, *Reading Faulkner: Collected Stories* (with James B. Carothers), and *The Cambridge Introduction to William Faulkner*. With Peter Lurie, she is co-editor of *The Faulkner Journal*.

Link: https://faulkner.drupal.shanti.virginia.edu/

The University of Texas at El Paso

2019-2020 OER/Affordable Course Materials Research Cohort

In September 2019, UT El Paso launched its inaugural 2019-2020 OER/Affordable Course Materials Research Cohort. This initiative included a competitive process to select 18 faculty to curate or create affordable resources. Participants receive $3,000 for OER professional development or to purchase technology that will facilitate their OER work. During 2019-2020, students saved nearly $200,000 in textbook costs. Approval from the Institutional Review Board has been secured to study the impact of this OER project on student success outcomes and faculty satisfaction with OER materials.

Link: https://www.utep.edu/oer/people/index.html

The University of Texas Permian Basin

Forthcoming

The University of Texas Rio Grande Valley

OpenStax Institutional Partner Program

UTRGV has been accepted into the OpenStax Institutional Partner Program for 2020-2021. The OpenStax Institutional Partner Program is designed to provide institutions with free coaching, training, and support with the goal of increasing use of OpenStax and other open educational resources.

Link: https://openstax.org/institutional-partnership

Open Education Network and Scholarly Publishing and Academic Resources Coalition

UTRGV has acquired subscriptions to the Open Education Network (OEN) and the Scholarly Publishing and Academic Resources Coalition (SPARC) beginning in 2020-2021.

Links:

- https://open.umn.edu/oen
- https://sparcopen.org/

The University of Texas at San Antonio

OER @ Math Matters

Math Matters uses a hands-on approach where students learn math by doing math, not listening to someone else telling them how to do math. Student work with faculty, staff, and dedicated peer learning assistants in the classroom and in the Success Center, where students work online to complete course assignments. The YouTube video below provides OER-related information vis-à-vis Math Matters.

Link: https://www.youtube.com/watch?v=LCtdEr0x6_0&t=22s

First Year Experience: Research Press Repository

UT San Antonio is working with their First Year Experience team to document stories of incoming freshmen attending UTSA during Fall 2020. They are creating Spark pages and vlogs. We will upload their work to the RR Research Press repository. Exemplary projects will be featured in a custom UTSA version of Foundations of Academic Success: Words of Wisdom. Spark pages and vlogs will be collected in our repository by the end of the semester. The OER text will be ready sometime next Spring once faculty have selected exemplary student projects to include.

Link: https://open.umn.edu/opentextbooks/textbooks/foundations-of-academic-success-words-of-wisdom

The University of Texas at Tyler

OnCourse Texas Politics and American Government Textbook Project

As part of its OnCourse digital learning and student success project, the UT Tyler Office of Academic Success supported political science faculty to author two OER textbooks. *POLS 2305: Introductory American Government* and *POLS 236: Introductory Texas Politics* are required for all majors as part of the undergraduate core curriculum. The faculty-created OER textbooks were piloted during the Fall 2019 semester, and then fully launched in all sections of these courses in Spring 2020. Typically, the textbook for each course averages $100. During 2019-2020, the use of the OER textbooks saved students approximately $46,300 in POLS 2305 and $66,300 in POLS 2306 resulting in a total savings of $112,600. In addition, these OER textbooks were shared with local community college partners.

The textbooks were published by the UT Tyler Press, the official imprint of The University of Texas at Tyler. The UT Tyler Press is focused on publishing books with two objectives: 1) providing quality low-cost and no-cost textbooks to help lower the cost of higher education; and 2) publishing books that focus on capturing the legacy of East Texas and its people.

Link: https://www.uttyler.edu/press/

eBooks for Learning from the Robert R. Muntz Library

As an initiative to reduce the cost of attendance and enhance student success, the Robert R. Muntz Library purchased 116 eBooks which serve as required Fall 2020 textbooks and course materials at UT Tyler. When possible, the ebooks were purchased with unlimited access. If all students enrolled in these Fall 2020 courses used the library version rather than purchasing their own ebooks, cost savings for students would be over $130,000. If students avoided purchasing the print version of the required textbook or course materials, the savings to students would be over $200,000. Library staff have made a commitment to purchase required course titles available for sale to libraries every semester, with the belief there is no greater impact the Robert R. Muntz Library can make.

Link: https://www.uttyler.edu/library/

The University of Texas MD Anderson Cancer Center

OpenWorks @ MD Anderson

MD Anderson Cancer Center is in the implementation stage of OpenWorks @ MD Anderson. This platform will ensure that enduring materials and scholarship created by students, faculty, and staff are visible to the wider

academic community in order to promote MD Anderson as a center of excellence for cancer education and research and an active participant in Open Science.

Link: Anticipated Launch in Fall 2020