1) General Education Courses with Wide Cost Variance for Required and Recommended Textbooks and Instructional Materials

   a) Explain the methodology used for identification of general education courses with wide cost variance, defining wide cost variance. At minimum, report wide cost variance by dollar amount and percentage.

The cost of textbooks and instructional materials was examined by course section for the Fall 2016 semester for all USF System General Education courses (n=135). Total material costs for course sections were compared against other sections of the same course. A statistical analysis was performed to determine the maximum value for wide variance. Any General Education course with one or more course sections exhibiting wide cost variance was reported.

**Methodology**

The list of General Education courses offered during Fall 2016 was combined with pricing data for the USF System supplied by Barnes & Noble, the operator of the USF Bookstore. The maximum hypothetical cost of all materials for course sections with more than one item was totaled, with separate values for required and recommended materials. (NOTE: the term “maximum hypothetical value” is utilized here because these figures are based on the value of new textbooks/instructional materials being used when in fact USF Bookstore statistics reveal that a majority of bookstore transactions are for used purchases and/or rentals.)
Once the total required and recommended material costs were obtained for all course sections, the lowest total cost for each course was identified and compared against all other sections. Variance for each course section was calculated as the total maximum hypothetical cost of required and recommended course materials less the cost of materials for the course section with the lowest cost for each separately accredited member institution of the USF System. Although percentage of cost variance was calculated by dividing the variance amount by the lowest section cost and included in the data summary, it does not serve as an indicator for wide variance.

Figure 1. Variance values for General Education courses.

Variance values for General Education courses greater than zero were subjected to statistical analysis (see Figure 1). The median of cost variance greater than zero plus one standard deviation ($202) was determined to constitute the value for the maximum hypothetical wide cost variance.

b) Identify general education courses with wide cost variance among different sections of the same course. Is the cost variance justified with no actionable steps required or is follow-up required because the cost variance is not a justified variance? Describe the justification(s), if any.

- Required
- Recommended
Maximum Hypothetical Wide Cost Variance: General Education (Required)

Based on the analysis, wide cost variance was identified in six (6) General Education courses across the USF System (see Figure 2).

USF System - Fall 2016
General Education Courses
Required Materials

Variance

6

< = $202

> $202

Courses w/Required Materials (n=135)

Figure 2. Number of USF System General Education courses exhibiting wide variance in cost of required materials.

USF Tampa (n=5)

- ANT 2410 Cultural Anthropology
- ANT 3101 Archaeology
- BSC 2085 Anatomy & Physiology I for Health Professions
- BSC 2086 Anatomy & Physiology II for Health Professions
- IDH 3400 Social & Behavioral Science Honors

USF Sarasota-Manatee (n=1)

- MAC 1105 College Algebra
Maximum Hypothetical Wide Cost Variance: General Education (Recommended)

Based on the analysis, wide cost variance (variance exceeding $202) was not identified for recommended textbooks and instructional materials for the same General Education courses for USF Tampa, USF St. Petersburg, or USF Sarasota-Manatee.

Figure 3. Number of USF System General Education courses exhibiting wide variance in cost of recommended materials (n=34).

Regarding actionable steps, the University System will establish procedures consistent with the Collective Bargaining Agreement and best practices across the sector to evaluate cost variances. Faculty and department chairs will provide justifications for any wide cost variance prior to setting the requirements for textbooks and instructional materials for subsequent semesters.
c) Describe the textbook and instructional materials selection process for general education courses with a wide cost variance among different sections of the same course.

All course sections with wide variance occur within departments where the faculty can select the textbook for their sections.

d) What measures, if any, will be taken by the university to reduce wide cost variance among different sections of the same general education course?

In cases of wide variance, information will be provided to department chairs and individual faculty members. Report recipients notified of cases of wide cost variance will submit justifications for approval by their department chairs and for comparison to subsequent analyses.

2) High Enrollment Courses with Wide Cost Variance for Required and Recommended Textbooks and Instructional Materials

In an email dated August 17, 2016 from Lynn Hunt Long (Assistant Director, Academic & Student Affairs, SUS Board of Governors), the instructions regarding the “Textbook and Instructional Materials Affordability Report” requirements were modified to focus analysis on General Education courses, including high enrollment General Education courses. The specific language in the communication follows:

I have an update provided by Iris Elijah, Assistant General Counsel for the Board of Governors, regarding the language pertaining to high enrollment courses reporting. Her opinion is that the reporting requirement should show:

(1) the textbook and instructional materials selection process for general education courses with a wide cost variance and
(2) the textbook and instructional materials selection process for general education courses that are also high enrollment courses.

Section 1 (above) includes all the analysis of wide cost variance in both General Educations courses and in General Education courses that are also high enrollment courses.
a) Explain the methodology used for identification of high enrollment courses with wide cost variance, defining wide cost variance and high enrollment. At minimum, report wide cost variance by dollar amount and percentage.

See Section 1 (above).

b) Identify high enrollment courses with wide cost variance. Is the cost variance justified with no actionable steps required or is follow-up required because the cost variance is not a justified variance? Describe the justification(s), if any.
   • Required
   • Recommended

See Section 1 (above).

c) Describe the textbook and instructional materials selection process for high enrollment courses with a wide cost variance.

See Section 1 (above).

d) What measures, if any, will be taken by the university to reduce wide cost variance in high enrollment courses?

3) Specific Initiatives of the University Designed to Reduce the Costs of Textbooks and Instructional Materials

a) Describe specific initiatives of the institution designed to reduce the costs of textbooks and instructional materials.

USF Tampa Initiatives

Please see additional information concerning USF’s work to reduce the cost of textbooks (2010 to present) contained in the Textbook Affordability Project Report appended to this document.
Textbook Affordability Project (TAP) Website (http://tap.usf.edu). The USF Libraries developed a comprehensive resource for faculty, students, and policy makers who are working to reduce the costs of textbooks and instructional materials. Consistently among the top Google search returns for “textbook affordability,” this website serves as a central access point for all of USF’s textbook affordability programs. The integrated social media functionality engages faculty and students seeking solutions to textbook affordability.

Ebooks in the Classroom. Launched in 2009, the Ebooks in the Classroom Program acquires ebooks requested by faculty for their courses. Available at no cost to students, these ebooks are either required or recommended readings for a course with little to no restrictions on use (printing, downloading, simultaneous usage). Materials purchased by this program are accessible throughout the USF System. Savings for students to date: $1.4 million.

Print Textbooks on Course Reserve. Each year, the USF Libraries invest $30,000 to purchase two copies of each required textbook for courses with enrollments of over 100 students. These materials are placed on course reserve and are available for students to check out at no cost. The collection supports over 2,300 course sections with more than 1,100 textbooks. These textbooks were used more than 35,000 times during the period Fall 2015 – Summer 2016. The current value of this collection is over $140,000.

ARES & Copyright Clearance Center Licensing. The USF Libraries fund and maintain ARES, an online course reserve system to aid faculty in placing no-cost instructional materials on reserve in lieu of textbooks. To address concerns for copyright compliance, the USF Libraries funded a subscription to the Copyright Clearance Center’s Academic License service. Cumulatively these efforts led more faculty to use online course reserve and to make more content available to students.

EDUCAUSE/Internet2 Etextbook Pilot. The USF Libraries implemented a three-semester electronic textbook pilot in conjunction with 28 other colleges and universities. This pilot provided textbooks and instructional materials at no cost to faculty and students in participating courses. The results suggested that 1) teaching and learning was improved; 2) the price-point of the etextbook was a critical consideration to the participants; and 3) etextbooks are an acceptable format to both students and faculty, if the price point is significantly lower than that of print textbooks. At a cost of $90,000, this pilot program saved 4,849 students $553,000.
Open-Access (OA) Textbooks. By definition, the USF Libraries’ OA textbook collection is available at no cost to the global academic community. At present, the USF Libraries host 12 OA textbooks authored by USF faculty on our institutional repository, Scholar Commons. One title, Social Science Research: Principles, Methods, and Practices by Dr. Anol Bhattacherjee is the most downloaded publication on Scholar Commons with 336,806 downloads to date.

In 2015, targeting General Education and high enrollment courses, USF launched an Open-Access Textbook Initiative. In spring of 2016, a partnership of Innovative Education and the USF Libraries published its first fully funded OA textbook. Authored by USF faculty member, Dr. Jenifer Schneider, the Inside, Outside, and Upside Downs of Children’s Literature: From Poets and Pop-ups to Princesses and Porridge incorporates interactive features and multiple videos per chapter to enhance the reading experience. Published under a Creative Commons license, this publication and associated media are globally accessible. Savings for USF students over three semesters in Dr. Schneider’s courses: $180,000.

The USF Libraries and Innovative Education are presently preparing to publish another OA textbook authored by College of Engineering professor Dr. Kingsley Reeves that focus on probability and statistics in engineering.

USF St. Petersburg Initiatives

Print Textbooks on Course Reserves. USF St. Petersburg librarians actively acquire print textbooks to place on course reserve and have a robust process of advertising their availability across campus.

Open Education Resources/eBook Integration. Librarians and distance-learning instructional designers select courses that can serve as exemplars for faculty who want to incorporate ebooks from the existing USF Libraries’ collection, open-access materials, and library-licensed content. This effort includes 1) development of a resource guide that will direct faculty to available high-quality open-access education resources and 2) creation of a curated list of electronic textbooks held by the USF System libraries.
USF Sarasota-Manatee Initiatives

Print Textbooks on Course Reserves. USF Sarasota-Manatee faculty are encouraged to provide a print copy of the textbook/instructional material for placement on course reserve in the Information Commons. If faculty are unable to provide a copy of the textbook, USFSM Library Services will purchase a copy to place on reserve for students.

Textbook Lending Program. In collaboration with Student Engagement and Student Services, USFSM Library Services is establishing a cost-free textbook lending library driven by student textbook donations. This program will be active for the start of the Spring 2017 semester.

USF Bookstore Initiatives (operated by Barnes & Noble; USF System-wide impact)

Textbook Rentals. Textbook rentals have been in place since Fall 2010. In 2014, the USF Bookstore introduced a Flexible Pricing strategy to increase the number of rental titles offered to students (currently 81 percent) and provide increased savings to students. Renting new textbooks can save students 35-50 percent; used rentals can save 50-80 percent. According to Barnes & Noble, 58 percent of USF students choose to rent a book when possible.

Other strategies include:

- digital textbooks offered as a lower price alternative to print textbooks;
- used textbooks averaging 25 percent less than the new book price; and
- the Price Match Program (matches any competitor’s price excluding online peer-to-peer marketplaces).

Buyback/Cash for Books. Students can receive up to 50 percent of the sale price of the textbook.

Faculty Enlight. Includes open access content and allows faculty to see upfront retail pricing for textbooks during the selection process, as well as rental and digital availability options.

Student Financial Aid Integration. Since 2003, a partnership between Barnes & Noble and USF Financial Aid allows students to use a portion of their financial aid prior to disbursement to obtain textbook and instructional materials prior to, or at the beginning of the semester.
The USF Bookstore (operated by Barnes & Noble) reports that USF students saved $10,205,657 through their textbook rental program over the period 2010-11 to present.

b) With implementation of the initiatives, has there been any reduction in cost of textbooks and instructional materials to the students? If there has been a reduction in cost, what is the average cost savings? Describe the average cost savings comparing fall semester to fall semester and spring semester to spring semester.

USF has been capturing actual and potential cost savings at the aggregate level for specific textbook affordability initiatives. For projects such as ARES or Print Textbooks on Reserve, we offer resources or services to supplement textbook affordability that cannot be directly quantified. The following table summarizes quantifiable direct cost savings to students since the launch of our affordability initiatives in 2010.

<table>
<thead>
<tr>
<th>Affordability Initiative</th>
<th>Cumulative Savings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ebooks in the Classroom</td>
<td>$1,400,000</td>
</tr>
<tr>
<td>Open-Access Textbooks</td>
<td>$60,000</td>
</tr>
<tr>
<td>Barnes &amp; Noble Textbook Rental Program</td>
<td>$10,205,657</td>
</tr>
<tr>
<td>Cumulative Aggregate Savings</td>
<td>$11,665,657</td>
</tr>
</tbody>
</table>

Future analyses will report on average cost savings and compare those data to subsequent semesters.

c) With implementation of the initiatives, describe any reduction in cost variance among different sections of the same general education course and high enrollment courses? Describe the reduction in cost variance comparing fall semester to fall semester and spring semester to spring semester.

Future analyses will report on average cost savings and compare those data to subsequent semesters.
4) University Policies for the Posting of Textbooks and Instructional Materials

a) Explain University policies implemented in accordance with posting prominently in the course registration system and on the university website at least 45 days prior to the first day of class for each term, a hyperlink to lists of required and recommended textbooks and instructional materials information for at least 95 percent of all courses and course sections.

Section 1b of University of South Florida regulation 3.029 Textbook Adoption & Affordability specifies that textbook and instructional materials adoptions must be submitted “no later than forty-five (45) days prior to the first day of classes for each term.” Adoptions are posted on the USF Bookstore website (hosted and operated by Barnes & Noble). The Bookstore website is open to all students and supports searching for required and recommended textbooks by course and section. The listing presents pricing options including new, used, rental, digital new, and digital rental costs, as appropriate (see Figure 4).

Figure 4. Example of multiple pricing options for two required textbooks available at the USF Bookstore.
Students may also reserve and view textbook and instructional material selections via the OASIS student registration system. Once they enter OASIS, one menu option hyperlinks students directly to the USF Bookstore website to search for required and recommended textbooks by course and section with various pricing options (see above). If a student has already registered for a course(s), a second menu option presents students with their current schedule and a hyperlinked button (“Order Books”) that enters them into the website maintained by Barnes & Noble that lists required and recommended textbooks and instructional materials specific to their courses.

b) Report the number of courses and course sections and the total percentage of courses and course sections that were able to meet the textbook and instructional materials posting deadline for the academic year.

Based on the analysis provided by the USF Bookstore, the Fall 2016 compliance rate for the USF System is 96.5 percent with 6,036 of 6,252 courses/course sections reporting.

c) Report the number of courses and course sections and the total percentage of courses and course sections that were not able to meet the textbook and instructional materials posting deadline for the academic year.

Based on the analysis provided by the USF Bookstore, the Fall 2016 non-compliance rate for the USF System is 3.5 percent (216 of 6,252 courses/course sections).

d) Report the number of courses that received an exception to the reporting deadline. Provide a description of the exception.

No faculty requested exceptions to the reporting deadline and none were granted.

e) Are the policies effective in meeting the reporting requirement? If not, what measures will be taken by the university to increase faculty and staff compliance for meeting the reporting requirement?
An operational audit performed in 2013, demonstrated that the regulation and associated compliance efforts were successful in meeting the reporting requirement. After each reporting deadline, a list of non-compliant faculty is compiled and letters of counsel are sent to each individual listed. A third letter of counsel may occasion higher-level disciplinary action; as of this date escalation to this level has not been necessary.
Appendix: Textbook Affordability Project

USF’s work to reduce the cost of textbooks began in 2010 with the establishment of the Textbook Affordability Project (TAP). This initiative provided a framework for the USF Libraries’ operational solutions for and research into textbook affordability. The appended document provides an overview of some of the strategies employed as well as a snapshot of the ROI realized during the period 2010-2015.
TEXTBOOK AFFORDABILITY PROJECT
TAP.USF.EDU
Why Textbook Affordability?

The Textbook Affordability Project (TAP) provides affordable solutions to make course materials available to students.

Textbooks have always been a part of college costs. But in recent years, textbook prices have risen precipitously.

Consider the financial circumstances of USF students in 2013-2014:

- 74% had some form of grant or scholarship aid
- 42% received Pell Grants
- 48% had Federal student loans totaling $117,279,761

According to a US Student Public Interest Research Groups 2013 survey:
- 65% avoided purchasing a textbook due to price;
- 94% of those were concerned that doing so would hurt their grade; and
- Nearly half stated that the cost of textbooks affected how many and which classes they took each semester.

Against this backdrop, The University of South Florida Textbook Affordability Project launched in 2010 to support success for all USF students.
Since 2011, the USF Textbook Affordability Project’s course reserve initiative has given financially challenged students a path to succeed when they cannot afford to buy full-price textbooks.

Copies of printed textbooks are acquired through donations requested from publishers. Others are purchased from the USF Bookstore with funding contributed by USF Campus Business Services. The textbooks are then placed on reserve for students to use in the USF Tampa Library. Priority is given to textbooks which provide the greatest benefit to the most students; to date, 2,316 course sections have textbooks on reserve for 118,426 students to use.

**Benefits:**
- Offers financially challenged students an alternative to buying expensive textbooks
- Bolsters student success by offering those texts not available to students via USF’s Ebooks in the Classroom program

**Next Steps**
Funding increases will purchase more textbooks, benefiting more students in need:
- Additional copies of high-use textbooks allow more students to utilize them during peak times, such as before an exam.
- Because publishers are increasingly unwilling to donate textbook copies, this program needs new sources of funding to benefit a larger population of students.
Ebooks in the Classroom

USF’s Ebooks in the Classroom initiative is revolutionizing student learning and improving college affordability. Assigned class books are often published in electronic form and, since 2011, have been provided by the library at no cost to USF students.

Teaching faculty request ebooks from the library. The ebooks are then available to 100% of the students in the course. Recognizing that it provides significant benefits to students, the USF Tampa Library funds this popular program on an ongoing basis.

Benefits:

- Convenient and flexible, ebooks can be directly linked to a USF course website and accessed anytime, anywhere.
- Ebooks in the Classroom has saved students more than $1,071,455 over having to buy these books in print form.
- Most ebooks are owned in perpetuity once USF purchases them, so they are not a recurring cost. Cost savings grow with additional use in subsequent semesters.
- Ebooks are available to entire courses, thus engendering equity in the classroom; reducing haves/have-nots.

Next Steps:

- The USF Tampa Library is building a comprehensive database of ebooks with suitable usage conditions: the rights for students to print, download the text, and support for an unlimited number of users. This database will make it easier for faculty to adopt ebooks for courses.
- The USF Tampa Library is increasing acquisitions of ebooks in support of student coursework.
- Increased marketing and outreach to students, faculty, and parents.

ROI Snapshot

| Ebook Costs to USF Libraries | $100,630 |
| Anticipated Student Savings | $1,071,455 |

From 2011 through 03/2015, supporting courses with a total enrollment of 13,900 students.
Open Access Textbooks

Open access textbooks are an open educational resource freely accessible by all, without restriction. Open educational resources represent an exciting frontier in access to education and may take the form of a PDF, ebook, video, or other format.

The USF Tampa Library and USF Innovative Education have, since 2011, published and/or hosted open access textbooks in PDF form on the USF Scholar Commons website.

**Benefits:**
- Open access textbooks are available to benefit USF students as well as students and faculty around the world.
- Open access textbooks facilitate USF faculty teaching beyond USF, thereby expanding USF’s global reach.
- Once an open access textbook is created, it is easily revised and can be used semester after semester.

**Next Steps:**
- An open source textbook, “The Inside, Outside, and Upside Downs of Children’s Literature,” authored by USF Associate Professor Jenifer Schneider, will be published in 2015.
- The USF Textbook Affordability Project will increase the number of open access textbooks we support and publish in the coming years.

**ROI Snapshot**

“The Inside, Outside, and Upside Downs of Children’s Literature.”

Open Access Textbook Cost (Pilot) $30,000

Projected 3-Year Student Savings $180,000

Projected savings based on an enrollment of 1,200 students across six semesters at USF. Cost savings will be realized elsewhere as this textbook is adopted by other institutions.
What Happens Next?

We are creating a replicable model suitable for adoption by other institutions.

The USF Tampa Library is doing more to ensure greater textbook affordability and access for students:

1. Increase outreach to faculty members
   Faculty are the key to affordable options. The USF Tampa Library will ramp up awareness efforts to ensure that faculty have a better understanding of the issues and of the solutions to affordability.

2. Develop USF policies and procedures to strengthen open access
   Sound policies, procedures, and practices will encourage and support affordable options for USF students and advance a student-centric culture.

3. Adopt Licensed Content
   The USF Tampa Library continues to build a strong, comprehensive collection of ebooks, online journals, video, and more, that can be packaged as a custom ‘textbook’ or collection of course materials in lieu of expensive textbooks.

4. Join the Open Textbook Network
   OpenTextbook Network representatives from the University of Minnesota will conduct workshops at the University of South Florida to engage faculty directly with open textbooks. These workshops have resulted in a 40% adoption rate of open access textbooks for participating faculty.

5. Increase Level of Collaboration with USF Bookstore
   Explore options to negotiate with commercial publishers in order to lower cost through delivery of e-textbooks at the course level.
For More Information

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Download a PDF of this impact brief at: http://bit.ly/usf-tap

TEXTBOOK AFFORDABILITY project
TAP.USF.EDU

Report produced in November 2015 by Eileen M. Thornton in the USF Libraries Office of Communications and Marketing