

Open Access Textbook Task Force

Final Report



Submitted in fulfillment of the requirements contained in 1004.091(2) F.S.

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Executive Summary

In 2009, the Florida legislature passed legislation establishing the Florida Distance Learning Consortium (FDLC) which was tasked under *Section (s.) 1004.091(2), Florida Statutes (F.S.)*, entitled, *open access textbooks* with developing a plan for promoting and increasing the use of open access textbooks as a method for reducing textbook costs.

The 23 member Open Access Textbook Task Force (OATTF) was established in July 2009 to fulfill the requirements of the legislation. (Appendix J) The task force had broad representation from Florida's university and college communities – faculty, administrators, student government leaders, business officers, bookstores, and staff from the Board of Governors, Division of Florida Colleges, Florida Distance Learning Consortium and the University Press of Florida¹. See Appendix A for a member list.

The benefits of open access textbooks are many. The OATTF documented the cost savings and reduced debt load that an open textbook offers students. Textbook cost savings in one course can positively impact the ability of a student to enroll in a course for which there is an expensive textbook. The task force also believes that there are compelling academic reasons to use open access textbooks such as: improved quality, flexibility and access to resources, interactive and active learning experiences, currency of textbook information, broader professional collaboration, and the use of teaching and learning technology to enhance educational experiences.

Between July and December 2009, the task force studied the issues, identified and prioritized high enrollment general education courses for the use of open access textbooks, gathered and inventoried available open access textbooks, developed and conducted both faculty and student government leader surveys on their awareness and use of open access materials, and drafted both an implementation and security plan. The plan includes eleven proposed recommendations to promote and sustain open access textbook use in Florida in response to Legislative request.

The task force survey data was especially valuable, identifying faculty and student government leader concerns that must be addressed for a successful open access textbook initiative. Shared faculty concerns include: the lack of awareness or use of open access textbooks, assurance of academic quality, peer review and editing, institutional recognition for efforts in creating and developing open access materials, and challenges in allocating time for these activities. Student government association leaders' highest ranked concerns were the quality of open access textbooks and their cost. While the majority of students had not used open access textbooks, they indicated their preference for a print textbook. These faculty and student concerns were carefully considered when developing the open access textbook plan and associated recommendations which are intended to overcome these apprehensions.

The OATTF through collaboration with the Board of Governors and the Division of Florida Colleges developed a list of the prioritized high enrollment general education

¹ The University Press of Florida has served the entire university system since its inception 65 years ago. It has recently been designated as a system wide Academic Infrastructure Support Organization (AISO) by the State University System Board of Governors.

courses for the possible use of open textbooks (Appendix F) and another list of the available open access textbooks. (Appendix G) What is missing is the “Open Access Targeted Course and Textbook List” that would map the available textbooks to the prioritized general education courses so that faculty and departments can easily locate courses and relevant available high quality textbooks. Only two open access textbooks have been reviewed thus far for the purpose of identifying the relevant common course number and assessing quality. This is due to budget constraints. The cost ranges from \$250 to \$500 per review. Two reviews are required for each textbook based on conventional publisher practices. Between \$78,500 and \$157,000 is needed to complete reviews on all currently available open access textbooks using the current methodology.

The complete list of recommended courses is available as Appendix F, with the top six courses, in order of priority being:

1. College Algebra - MAC X105
2. Introduction to Psychology - PSY X012
3. Introduction to Statistics - STA X023
4. Principle of Macroeconomics – ECO 2013
5. Principles of Microeconomics - ECO 2023
6. Intermediate Algebra - MAC X033

From the data, it is apparent that a statewide awareness campaign regarding open access textbooks is needed. A comprehensive statewide **survey of faculty and administrators** revealed that less than one-half of Florida faculty respondents were aware of open access textbooks. And, only 12.1% of these respondents are currently using open access textbooks or resources. (Appendix B: Faculty Survey Results) Faculty requested face-to-face interaction regarding this important topic. Key concerns voiced by faculty/administrator respondents regarding the use of open access textbooks were 1) academic quality of the materials, 2) lack of time needed to review and select them, 3) a lack of knowledge about what open textbooks are and how to find them. Additional barriers were found in association with the adoption, sustainability and security of the copyright materials. (Appendix C: Faculty Survey Questions) The disconnect between digital publishing and institutional and statewide recognition and incentive systems was well documented and warrants further study for appropriate and faculty valued solutions.

The statewide **survey of student government leaders** revealed that the majority of respondents had not used open access materials. When asked to identify the factors that open access textbooks must meet to address student needs, they expressed the greatest concern that open access textbooks should be of high quality, textbooks be available at no cost and also available for unlimited printing. They expressed a willingness to use and or support increased availability of open access textbooks. The majority of students also indicated their desire to purchase a print textbook. (Appendix E: Student Government Leader Survey Results)

Protocols for the review, publishing, and distribution of open textbooks greatly benefited from evolving processes reported on as they are established in Orange Grove Texts *Plus*, a new open textbook initiative of the University Press of Florida and The Orange

Grove Digital Repository launched in September, 2009. Jacky Hood, Director, Open Textbook Project, stated “Florida is the nationwide leader in open textbooks with Orange Grove Texts *Plus*, an innovative partnership between the Florida Distance Learning Consortium Orange Grove Repository and the University Press of Florida.”

The OATTF members want to express their appreciation for the opportunity to study the issues, develop an implementation plan for Open Access Textbooks and offer recommendations to promote and increase the use of open access textbooks. Open access textbooks present a viable solution to the rising cost of student textbooks.

Listed below are the final task force recommendations to meet critical, identified needs for a successful implementation of open access textbooks in Florida.

Recommendation (1): The OATTF recommends that the Florida Distance Learning Consortium in consultation with the Board of Governors and the Division of Florida Colleges periodically update the open access textbook inventory and annually update the prioritized list of general education courses recommended for the possible use of open access textbooks. This prioritized list of general education courses should also map available open access textbooks to a specific prioritized course number when that information becomes available. Any course number for which there is an identified open access textbook should also be included in the list which would be available on-line.

Recommendation (2): The OATTF supports the joint legislative budget request by the Division of Florida Colleges and the Board of Governors for equal support the repository software maintenance fee of \$85,000.

Recommendation (3): The OATTF endorses the proposed plan for the review and approval of open access textbooks that has been developed and implemented through the Orange Grove Texts *Plus* initiative based on publisher practices.

Recommendation (4): The OATTF recommends that the Florida Distance Learning Consortium coordinate interested individuals or groups, with approval from the Board of Governors and the Division of Florida Colleges, that will investigate and identify funding sources to support a competition to develop open access materials for prioritized Florida courses. This recommendation is not to the exclusion of efforts to seek external support for textbook development and peer review.

Recommendation (5): The OATTF recommends that both the Division of Florida Colleges and the Board of Governors appoint appropriate academic representation to develop and recommend review criteria or guidelines for the inclusion of digital scholarship in tenure and promotion decisions. The Florida Distance Learning Consortium will research and identify similar policies or criteria currently in use or in development.

Recommendation (6): The OATTF recommends that the Florida Distance Learning Consortium develop professional development materials, a media kit and offer an awareness campaign on individual campuses that will raise awareness of and promote the use of open access textbooks and

instructional materials. The focus should be to offer a wide selection of teaching resources for selection, modification and/or reuse, while still preserving the principle of academic freedom. Media kits should be sent to local student media sources.

Recommendation (7): The OATTF recommends that faculty be encouraged to contribute a textbook to an institutional or statewide foundation by providing a federal income tax charitable contribution credit. The value of the tax credit would be established by the University Press of Florida.

Recommendation (8): The OATTF recommends that institutional leadership be informed regarding barriers and incentives needed to encourage significant faculty adoption of open textbooks and asked to explore, enhance and report on successful institutional specific incentives that promote digital academic involvement. These incentives should integrate with existing institutional recognition systems to acknowledge digital scholarship.

Recommendation (9): The OATTF recommends that the Florida Distance Learning Consortium request nominations for a statewide committee that will recommend, develop, and establish a statewide recognition system that evaluates such criteria as: high quality contributions of open access textbooks and materials, increased student performance through the use of open access materials, increased student satisfaction, or the decrease in costs for student course materials. Faculty and staff recognized for this honor would be invited to participate in a wide range of roles.

Recommendation (10): The OATTF recommends the continued use of repository software to ensure system protection that makes the rights statement and terms of use clearly visible to the consumer.

Recommendation (11): The OATTF recommends that the Florida Distance Learning Consortium monitor and annually report on the adoption rate of open access textbooks, progress of the initiative, and satisfaction of faculty and students regarding their use of open access textbooks.

Introduction

The **high cost of textbooks for our students** has grabbed the attention of our state from the governor to the legislature, chancellors, college and university presidents, faculty, and most especially, the students. According to The Office of Program Policy Analysis and Government Accountability (OPPAGA) Report No. 08-29. “The cost of college textbooks and required course materials has increased faster than inflation, and averages about \$120 per course for common undergraduate classes. Textbook costs vary by discipline, and are highest for life sciences, physical sciences, business, and mathematics courses.” And, for students majoring in these subject areas, the cost of textbooks often exceeds the cost of tuition in Florida.

State and federal leadership across the country are in agreement that a solution to the high cost of textbooks must be found. Open Access Textbook (OAT) initiatives are one very promising solution. The recently released 2010 Horizon Report (<http://www.nmc.org/pdf/2010-Horizon-Report.pdf>), a collaboration between the New Media Consortium and Educause, predicts that **open content will reach mainstream within one year and the “Time-to-Adoption of open-content textbooks that can be “remixed” – that is customized, modified, or combined with other materials - is one year or less.** Part of the appeal of open content is that it is also a response to both the rising costs of traditionally published resources and the lack of educational resources in some regions, and a cost-effective alternative to textbooks and other materials.”

Open content and open access textbooks are instructional resources that can be used, reused, often remixed and customized under a creative commons license that permits the author/s to retain ownership of their content, yet establish the rights under which the content may be used by others (www.creativecommons.org). Creative Commons licenses are free, easy-to-use legal tools that are standardized, globally accepted and understood in many languages to support open content including open access textbooks.

The Florida legislature passed legislation in 2009, *Section (s.) 1004.091(2), Florida Statutes (F.S.)*, entitled, *open access textbooks* that requires a collaborative study and development of a plan for Florida to promote and increase the use of open access textbooks as a method for reducing textbooks costs.

To respond to the legislation, the Open Access Textbook Task Force (OATTF) was established with broad postsecondary representation from multiple sectors. Nominations for membership on the Task Force were requested from the Board of Governors, the Division of Florida Colleges, student government leaders, University Press of Florida and the Florida Distance Learning Consortium. Institutional representation was balanced geographically and for institutional size and location. Representation was also balanced among campus roles: faculty, administration, business officers, chief information officers, librarians, medical schools, distance learning, University Press of Florida, and The Orange Grove Digital Repository, A complete listing of the 23 member Task Force membership is provided as Appendix A. The Task Force charge and accomplishments are summarized in Appendix B.

The task force did not find any postsecondary statewide initiatives outside of Florida that offered truly open access textbooks. The University System of Ohio’s Textbook

Affordability Grant program spent \$250,000 in 2009 to hire faculty teams to develop course materials which are not available for use outside of Ohio. (<http://uso.edu/opportunities/textbooks/grants.php>) Each award was capped at \$50,000 with the option to increase the award if more institutions adopt the finished materials. Other states are considering open textbooks initiatives, but are looking to Florida for lessons learned from Orange Grove Texts *Plus*, an operational open access textbook initiative for postsecondary education. Currently, only Florida offers such a statewide initiative that combines easy online access and full publisher review and development capabilities.

This report is divided into two sections.

- **Section 1** provides foundational information to understand open access textbooks – a brief chronological history, a definition of relevant terms, and an expanded rationale for open access textbooks.
- **Section 2** presents a plan to promote open access textbooks and their use in Florida, including components mandated in legislation.

Section 1:

Understanding Open Access Textbooks

Brief Chronological History

Over the past five years, the high cost of textbooks has been well documented and resulted in legislative and now congressional activity to counteract those costs. Listed below are key activities and/or findings.

2005

According to the 2005 United States Government Accountability Office report, “College Textbooks: Enhanced Offerings Appear to Drive Price Increases,”

“In the last two decades (1984-2004), college textbook prices have increased at twice the rate of inflation. Increasing at an average of 6 percent per year, textbook prices nearly tripled from December 1986 to December 2004.”

The cost of textbooks has become a barrier for students to earn a college degree, adding additional debt to their financial burden and requiring students to work long hours or not even purchase the book.

2008

The 2008 Distance Learning Task Force Report recommended exploration of open access textbooks that would build on Florida’s existing infrastructure – the statewide

digital repository and the premier University Press of Florida to move Open Access Textbooks forward.

The Florida legislature recognized the rising cost of textbooks when it passed 1004.085, *F.S. Textbook Affordability*, in 2008. The Florida Board of Governors (BOG) established a taskforce in July 2008 including faculty, administrator, student, and library representation statewide as well as representation from the Florida Distance Learning Consortium and the Division of Florida Colleges. Technical assistance materials were designed to accompany BOG Regulation 8.003, Textbook Adoption, as recommended by the task force and approved by the BOG, March 2009. One of the technical assistance documents shared with Florida by the Minnesota Office of Higher Education, is, "Strategies for Reducing Text Book Costs." The introduction states:

Books are an essential part of higher education. High-quality reading materials are behind every great college course when they are thoughtfully selected to enhance student learning. Textbooks can guide discussions, frame issues, illustrate processes, identify critical questions and generally enrich the classroom experience in important ways. Yet in recent years, the price of college textbooks has become a growing concern for students and others who care about keeping college costs affordable.

Nationally, colleges report an increase in textbook costs of about 19 percent over three years, from academic year 2003-04 to 2006-07. Full-time students pay an average of \$898 per academic year for textbooks, and are often surprised by the required expense, which is often the last and least anticipated expense encountered after they enroll. As policymakers and higher education systems explore the issue further, there are actions that can be taken immediately on college campuses to reduce the cost of textbooks.

The strategies provided by the BOG to reduce textbook costs include suggestions such as: submit textbook orders early, comparison shop, evaluate new editions carefully, consider textbook rentals, and request retail textbook cost information from the publishers. Many states, including Connecticut, Washington, Oregon, Oklahoma, Minnesota, Arizona, Colorado and Missouri, have recommended similar policies to solve rising textbook costs which average \$898 per year, according to the GAO -- or \$3,600 or more for four years. In 2008, strategies were focused on the traditional publisher book model.

2009

In September, 2009, **Orange Grove Texts Plus**, a Florida open access textbook project, was launched as a joint initiative between The Orange Grove Digital Repository, a project of the Florida Distance Learning Consortium, and the University Press of Florida, the official publisher of Florida's postsecondary educators. The initiative began with a handful of books and now offers over 158 open access textbooks in a variety of subject areas for higher education. These books are currently available through the repository for download, printing or to purchase a low cost print-on-demand textbook in black and white or color.

In response to 1004.085 *F.S.*, the Division of Florida Colleges established the Textbook Affordability Workgroup, including representation from colleges within The Florida

College System, which prepared and submitted a report to the State Board of Education in December, 2009. One of the recommendations was that “The State Board of Education endorse further exploration of open access textbooks.” Other recommendations included textbook rental programs, acquisition of e-textbook licenses, college development and monitoring of policies and guidelines for textbook adoption, and student government association promotion of student awareness of ways to minimize textbook costs. The workgroup also recommended exempting textbooks from sales tax. The Textbook Affordability Workgroup recognized that individual colleges are taking steps to address textbook affordability.

2010

There are currently three bills under consideration in the US Congress dealing with the development and delivery of open textbooks.

- H.R.1464: *Learning Opportunities with Creation of Open Source Textbooks (LOW COST) Act of 2009*, would require identified Federal agencies to collaborate in the development of free, open source college-level physics, chemistry, and math educational materials.
- Both the S. 1714: *Open College Textbook Act of 2009* and H.R.4575: *Open College Textbook Act of 2010* seek to authorize federal grants for the creation, updating or adaptation of open textbooks into open formats for postsecondary coursework.

Of relevance to The Orange Grove and Orange Grove Texts Plus, is the requirement within H.R. 4575 for grantees to provide a plan for quality review and review of accuracy of content; providing the widest possible access, distribution, and adoption of the open textbook; and a plan for tracking and reporting formal adoptions of the open textbook. All three bills discuss the need to provide content on an easily accessible and interoperable web site. H.R.4575 Open College Textbook Act of 2010 further stipulates that content must be made available free of charge, and may be downloaded, redistributed, changed, revised, or otherwise altered by, any member of the general public.

Protecting Open Access Intellectual Property: Creative Commons Licenses

What is emerging as the most promising solution to reduce textbook costs is “open access” or “open” textbooks. While open access textbooks are freely available online to download or print, there are modest costs to sustain the infrastructure and delivery system. The Student Public Interest Research Group (SPIRG) defines open textbooks as “**complete digital textbooks that are accessible online at no cost, and affordable to purchase printed as a book.**” US Senator Durbin recently introduced Senate Bill 1714: Open College Textbook Act of 2009. In its current form, the bill defines an Open Textbook as “college textbooks or course materials in electronic format that are licensed under an open license, which is an irrevocable intellectual property license that grants the public the right to access, customize, and distribute copyrighted material.” It is interesting to note that the student open textbook definition focuses on costs while the

US Senate Bill focuses on copyright and conditions of use for text books to be commissioned by the US Government.

Licenses that are attached to truly open textbooks are usually one of the Creative Commons (<http://creativecommons.org/about/licenses>), although some works are also in the public domain. Creative Commons licenses have been an enabling factor and a critical component for all open content, including open access textbooks. Creative Commons licenses allow the original authors to **keep their copyright** but allow others to copy and distribute the work provided they give credit (attribution) to the original author — and only on the conditions the original author specifies. Many authors license their open textbooks to allow anyone to use, download, customize, print, and even make derivative works without expressed permission from the author.

There are six different creative commons licenses. At a minimum, attribution must be given to the author to use their work. Factors governed by the licenses are whether others can copy, distribute, display, perform, commercialize, or make derivative works from the copyrighted work. And, if the author allows derivative works, creative commons allows the author to specify whether the derivative must have a license identical to the license that governs the original work.



An example of the most commonly used Creative Commons license for open access textbooks is expressed by the visual symbol to the left and listed below. It restricts use to non-commercial purposes.

“This work is licensed under the *Creative Commons Attribution-NonCommercial-ShareAlike 3.0 Unported License*. To view a copy of this license, visit <http://creativecommons.org/licenses/by-nc-sa/3.0/>. You are free to copy, distribute and transmit this work and to adapt this work if you attribute authorship and use the work for non-commercial purposes. If you alter, transform, or build upon this work, you may distribute the resulting work only under the same or similar license to this one.”

Definitions

There has been significant confusion regarding the appropriate term/s used to discuss open access textbooks. The OATTF took great care to define the relevant terms and to offer a new term, *dynamic textbooks*, to address an important and emerging open access textbook format. The three defined terms are: open access textbooks, dynamic textbooks and eTextbooks.

- **Open Access Textbooks** are complete digital textbooks that are accessible online at no cost, and affordable to purchase printed as a book. They can be printed or downloaded from a website or repository at no cost. In addition, a student can usually order a print on demand copy of an open access textbook at a very low cost in either black and white or color through an associated vendor. They are often available as a PDF.

- **Dynamic Textbooks** are open access textbooks for which there are a large number of embedded links to digital resources such as original source documents, maps, simulations, videos, games, podcasts, flash animations, and relevant websites. In many cases, a low cost, print-on-demand version is also available for a Dynamic Textbook.
- **eTextbooks** are electronically enhanced commercial publisher textbooks which include similar content to that in dynamic textbooks, however, there are often restrictions related to access. For example, the student usually may access or download the textbook from a single computer only and for a set number of days, such as 120 or 180 days; with access expiring at the conclusion of the allotted period. Other restrictions may apply to the number of pages that can be printed at one time.

Why Open Access Textbooks?

There are compelling arguments to support open access textbooks. Most frequently, the straightforward economic merit of open access textbooks is cited: an open access textbook can greatly reduce the high cost of textbooks.

Savings. Discussions in Florida regarding open access textbooks have estimated some spectacular savings for Florida students. For just one general education course, College Algebra (MAC1105), with an annual statewide enrollment of well over 100,000 students, reducing the typical textbook cost from \$130 to \$50 could amount to a yearly savings of \$8 million for students. Responding to a recent OATTF survey, Florida's student government leaders overwhelmingly confirmed that textbook costs in Florida are too high and indicated their willingness to promote open texts to reduce costs.

The table below lists sample current textbooks costs for two Florida courses.

Table 1: Sample print textbook costs at selected Florida institutions

Course	Institution	Campus Bookstore Cost		Rental/eBook Cost	Amazon.com Cost		Orange Grove Text Plus Cost ²
		new	used		new	used	
MAC 1105¹ College Algebra	FSU	\$88	\$66	NA	\$106	\$35	\$43.50 + \$7 s/h
	UF	\$155	NA	NA	\$124	\$73	
	BC	\$155	\$110	NA	\$155	\$120	
	SPC	\$127		NA	\$94	\$58	
STA 2023¹ Statistics	FSU	\$147	\$109	\$62.50	\$104	\$75	\$44.50 + \$7 s/h
	UF	\$149	\$112	NA	\$149	\$113	
	BC	\$155	\$116	\$100.75	\$131	\$102	
	SPC	\$127	NA	NA	\$90	\$75	

Key: Florida State University (FSU); University of Florida (UF); Broward College (BC); St. Petersburg College (SPC)

¹ Book selection varies by institution, so the chart illustrates the cost of the book currently being used in each course at the various institutions. Affordability can also be impacted by buyback of a textbook.

² These prices are based on the Overhead Support Fee sustainability support model discussed in Section 2.

While the potential cost savings is significant, faculty support for open access textbooks is about **both** economics and academics. In fact, the OATTF believes that the academic merits and value of open access textbooks are even more compelling than saving dollars.

- **Quality.** Robert Stewart, a professor of oceanography at Texas A&M University, cites the quality control element of open access textbooks as an additional benefit. Students and colleagues regularly read his open access text and send him comments relating to any errors of fact, typographical errors, and suggestions for improvement. Errors may be corrected immediately, not in two to five years the typical revision cycle for a commercial textbook.

Some faculty members are selecting chapters or parts of existing open texts and adding content that they have authored -- to create their own customized textbooks to better meet student needs. Dr. Erik Christensen, South Florida

Community College, customizes an open textbook each semester for his Physics with Calculus course. Despite some added work, he reports that his students are far more successful using the customized National Science Foundation open textbook and are pleased at the 700% reduction in textbook costs.

A recent OATTF survey of Florida student government leaders indicated that open access textbooks used in their courses were perceived to be of the same quality as traditional publisher textbooks and a few students stated that they were of better quality.

- **Flexibility and Access.** Open access promotes flexibility and provides access to resources: it allows faculty who teach similar or identical courses across the country (e.g., Introduction to American government, American history to the Civil War, or College Algebra) to adopt some components of such courses while also encouraging faculty to select and adopt content modules in order to custom design reading for distinctive components of a program.
- **Currency of information.** For those disciplines that stress currency of information such as engineering or other technical disciplines, open access allows for timely changes and editing to keep the information up-to-date. For those disciplines that do not require currency, open access textbooks provide the basic factual information that does not quickly go out of date and which is such an important component of general education textbooks. Open access can increase efficiency by reducing the need to continually reinvent the wheel for basic courses.

Randy Larsen, a professor of Computer Information Systems at Estrella Mountain Community College, stated “In my opinion, technology textbooks are a waste of natural resources. They’re out of date the moment they are published. Because of their short shelf life, students don’t even want to hold on to them.”

At Rice University, faculty in the Electrical Engineering Department update their signal processing open access textbook each semester because the information changes dramatically in a short period of time. Each chapter is updated by a Rice University professor who is a recognized expert in the topic. The new version is ready for publication in a matter of days or weeks. This ensures that students learn the most up to date and relevant information every semester based on faculty expertise and research.

- **Professional collaboration.** Open access also promotes professional collaboration in the design, delivery, and assessment of courses by enabling those who are teaching and researching in a field to participate in the design and delivery of the textbooks that are used. This can promote many faculty as stakeholders in the open access textbooks rather than just a small percentage of faculty that develop commercial textbooks.
- **Teaching and Learning Technology.** The Orange Grove Digital Repository and other educational repositories help to organize and provide easy access to a wealth of free simulations, flash animations, lesson plans, and multimedia objects in multiple disciplines ranging from biology to world languages. These resources

can help to build a dynamic open access textbook that promotes active and interactive learning. In some cases, such as Orange Grove Texts *Plus*, a link is provided to a print-on-demand publisher, enabling students to order low-cost print copies of textbooks and in some instances offer electronic student aids.

Section 2:

A Plan to Promote and Increase the Use of Open Access Textbooks in Florida

The preparation of a successful plan involves many factors – establishing priorities and workable processes, learning about the intended users of open access textbooks and ensuring sustainability of the project. The diverse makeup of the task force provided a wide range of expertise. Several members had also participated in the Textbook Affordability Task Forces for the Board of Governors and the Division of Florida Colleges that provided recommendations to ensure compliance with federal and state legislation. Their research and reports provided analysis of activities in other state higher education systems, the work of the Student PIRGs, industry analyses and recent developments in open access educational materials. One member had developed a dynamic open access textbook which he uses for his American Government course. Representatives from The Orange Grove Digital Repository and the University Press of Florida were able to inform the task force about the open access textbook initiative, Orange Grove Texts *Plus*, which is currently underway. Related US Department of Education FIPSE grants managed by The Orange Grove staff also provided contacts throughout the United States to further inform the plan and information. Statewide surveys of faculty, administrators and student government leaders provided valuable insights regarding the users of open access textbooks.

The following plan to promote and increase use of open access textbooks in Florida addresses six essential components:

- 1) Strategies for production and distribution
- 2) Open Textbook production and review protocols
- 3) Awareness campaign
- 4) Adoption and use
- 5) System security
- 6) Sustainability

1a. Strategies for the Production of Open Access Textbooks

It was agreed that Florida's high enrollment general education courses were a primary focus for open access textbooks. The next area of concern was ensuring that appropriate high quality affordable open textbooks exist to support Florida general education courses. While there are a number of open textbooks and their number are increasing, many texts are focused in specialized areas, may not cover a specific topic, or take an approach to a topic that may not be appropriate for a Florida general education courses.

To help Florida move systematically to provide texts for its general education courses, the Open Access Textbook Task Force (OATTF) first asked its members to work with their home institutions to prioritize their general education courses. High enrollment course data from the Board of Governors and the Division of Florida Colleges was also factored in. From a list of high enrollment and most transferred general education courses, members prioritized their top 20 courses for consideration in the use of open access textbooks in Florida. They assigned a priority ranking for up to five courses at

each of four priority levels with level one being the highest priority. Members were asked to consider the following criteria when prioritizing courses:

- the level of interest in open textbooks among faculty;
- courses that have the highest number of online sections;
- highest enrollment courses;
- courses with high numbers of transfers.

The complete list of high priority general education courses is available as Appendix F, but the top six courses, in order of priority were:

1. College Algebra - MAC X105
2. Introduction to Psychology - PSY X012
3. Introduction to Statistics - STA X023
4. Principle of Macroeconomics – ECO 2013
5. Principles of Microeconomics - ECO 2023
6. Intermediate Algebra - MAC X033

The task force also completed an inventory of open access textbooks. (Appendix G) The inventory continues to expand as new textbooks are identified. As of February 1, 2010, approximately 150 textbooks are listed. However, quality textbooks are not available for all prioritized general education courses listed in Appendix F. For the top six high priority general education courses listed above, open access textbooks are available for two courses, College Algebra and Introduction to Statistics. The University of Florida Math Department and the Provost's office are creating a three-semester open access calculus book (Mac 2311, 2312, 2313) for Orange Grove Text *Plus* that will reduce the cost to students by at least \$100 per student and will still include on-line homework and testing. The books will be suitable for use by pre-engineering students as well as general education credits. The first draft will be class tested this fall in the honors sections.

Due to budget constraints, only two open access textbooks have been reviewed by faculty through a paid, formal review process. The review assesses quality, any adaptations required to use the textbook in Florida and the identification of any relevant Statewide Course Numbers. The University Press of Florida selects and hires appropriate faculty to complete the reviews. Two faculty reviews are required for each textbook; the cost ranges from \$250 to \$500/review depending on the length and complexity of the textbook. Other options being pursued are to use reviews conducted by other organizations such as the Community College Open Textbook Project when available.

What is needed is an "Open Access Course and Textbook List" that would map the available open access textbooks to the State Course Numbering System so that faculty and departments can easily identify courses with available high quality open access textbooks. This list would become a guide in the prioritization of efforts.

Recommendation (1): The OATTF recommends that the Florida Distance Learning Consortium in consultation with the Board of Governors and the Division of Florida Colleges periodically update the open access textbook inventory and annually update the prioritized list of general education courses

recommended for the use of open access textbooks. This prioritized list of general education courses should also map available open access textbooks to a specific prioritized course number when that information becomes available. Any course number for which there is an identified open access textbook should also be included in the list which would be available on-line.

1b. Strategies for the Distribution of Open Access Textbooks.

A free online repository, The Orange Grove, is currently functioning as the storage and distribution vehicle for open access textbooks, as well as thousands of other instructional resources. Access to open textbooks is open to the general public, and students can link to texts through their learning management system, course web pages, or download texts to their personal computers or mobile device. The Open Textbook Resources collection currently stores over 150 open textbooks, some of which are offered as Orange Grove Texts *Plus*.

The Orange Grove Digital Repository is a central component of an open access textbook initiative. The repository software has a perpetual license that requires an annual maintenance fee of \$85,000. The Task Force suggests that the Division of Florida Colleges and the Board of Governors should continue to equally support that fee.

Recommendation (2): The OATTF supports the joint legislative budget request by the Division of Florida Colleges and the Board of Governors for equal support the repository software maintenance fee of \$85,000.

By partnering with the University Press of Florida (UPF) to form Orange Grove Texts *Plus* (OGT+), Florida now has access to the expertise of a respected press and its editorial staff. The repository also provides a mechanism to purchase low-cost print copies from the print-on-demand printer, Integrated Book Technology. This on-demand printer was selected by UPF for the Orange Grove Texts *Plus* project. The priorities of OGT+ are affordability, accessibility and adaptability.

Even with affordability as a priority, it was evident that on-line instructional resources were expected and necessary for faculty use of open access texts. Such devices as teacher's manuals, test banks, and study guides are used throughout the state. To help accommodate the faculty, OGT+ is partnering with WebAssign, a full-service, on-line homework service, already in use at many Florida universities and colleges. Such a partnership will allow OGT+ to serve critical teaching needs at an affordable price.

Jacky Hood, Director of the Community College Open Textbook Project, recently commented that "Florida is the nationwide leader in open textbooks with Orange Grove Texts *Plus*, an innovative partnership between the Florida Distance Learning Consortium's Orange Grove Repository and the University Press of Florida. This partnership addresses the key concern of faculty in using open resources: quality. The University press brings full publisher quality control, editing, and other services as well as fast, cost-effective production of bound versions of open textbooks. The Orange Grove provides indexed storage, search capabilities and persistent versioning among its capabilities. Other states and provinces will be looking to Florida as a model for the new world of modifiable, low cost open textbooks."

2. Protocols for Open Textbook Production and Review

Three production options and their associated review procedures have been identified to secure open texts for high priority general education courses.

- 1) to use an existing textbook as-is;
- 2) to modify/adapt an existing textbook to meet Florida criteria for a prioritized course;
- 3) to develop a new textbook.

The processes for reviewing these texts and readying them for production are based on current UPF protocols modified for the three open access textbooks types. The easiest and least expensive option is to use an existing textbook without any changes, or, “as-is”. And, the most expensive option is to develop a new textbook.

1) Production approach: Use existing open textbooks, as-is.

Currently, The Orange Grove repository searches for and stores a number of open textbooks that can be used as-is, online. They can be accessed and read from the repository or downloaded to a computer or to a course web page or to an institutional learning management system. Some of these texts have previously been subjected to a rigorous academic review. To ready one of these texts for use as a print-on-demand Orange Grove Text *Plus* textbook, the following additional steps are required:

- A. Preparation and Development. University Press of Florida (UPF) assesses the text, including any copyright issues that might require permissions and any available reviews or sales figures of the original published work.
- B. Review Processes. If the assessment results are positive, UPF evaluates the text file (usually a PDF) to identify any manufacturing/production problems and costs. UPF assigns a price to the book, and additional UPF approvals are requested.
- C. Production. When approvals are complete, UPF assigns an ISBN for bookstores to use when ordering, has a cover designed, uploads the cover and print-ready PDF to Integrated Book Technologies (IBT) for printing preparation, and creates a low-resolution PDF for posting to the Orange Grove repository. UPF staff enters required descriptive information about the text into The Orange Grove. This generates the “Buy This Book” button. Final approval of all OGT+ items added to the repository is provided by the UPF and also The Orange Grove staff. *Significant UPF costs are generated in this step.*
- D. Publication. UPF’s Information Technology (IT) manager provide title, ISBN, price, etc., to IBT, so that they can add the book to the existing virtual shopping cart, thus enabling the title to be ordered as a POD title.

Costs for these activities may vary depending upon length and complexity of the textbook. Costs include:

- honoraria paid to external reviewers (\$250-\$500 per report)
- overhead costs for reviewing the content in-house and readying the files for inclusion in the OGT+ imprint (approximately twenty hours of staff time at \$25 - \$50/hour per project),

- a \$100-per-title fee paid to the printer for preparing the electronic book files for print-on-demand access.

Faculty survey input has confirmed that it is desirable that existing texts garnered from other websites be peer reviewed in order to assure Florida faculty of their quality and fit for Florida courses. Indeed, the most highly ranked factor affecting faculty members' likelihood of using open access texts is concern for their academic quality. But, as peer review funds are limited, UPF and The Orange Grove will have to determine on a case-by-case basis whether or not already published textbooks should subsequently be formally reviewed by external peer reviewers.

2) Production approach: Modify/adapt existing textbooks for Florida prioritized courses. Some existing open textbooks may need only minor modifications to make them appropriate choices for Florida courses. To move this process forward quickly, OGT+ is working to have three texts readied as soon as possible: *Collaborative Statistics*, *College Algebra*, and one text yet-to-be identified. In this process, the UPF Editor-in-Chief is recruiting external developmental editors to accomplish any needed modifications, with one developmental editor assigned to each textbook discipline. Each developmental editor will help identify several faculty to peer review the text and to respond to a number of criteria regarding the quality of the text and the modifications needed to support it as a choice for a Florida priority course. The developmental editor will coordinate any adaptations to the text, securing needed subject experts to create the enhancements/adaptations.

This approach involves additional costs:

- payment for the developmental editors (\$50-\$75 per hour with a predicted project total of approximately \$10,000 per title, depending on the complexity of the work required),
- peer reviews (\$250 to \$500 per critique), and
- any content creation (costs vary depending on the specialist work required), with
- editorial development of the book, typesetting, and copyediting (at \$25 to \$50 per hour).

These costs are over and above those incurred for approach 1: using existing textbooks as-is.

3) Production approach: Create new works. For new works, the UPF approval process will be the same as described for existing or as-is textbooks, except that a proposal for the book will initially be considered, rather than a full work. Additional costs and staff involvement include:

- A. Additional UPF editing costs and approvals associated with the project.
- B. For previously unpublished books, each UPF department will review and recommend one of three options: 1) include in OGT+ without peer review; 2) include in OGT+, pending positive peer review; 3) do not include in OGT+ (in which case the text could be added to the Open Textbooks section of The Orange Grove; without being added to the OGT+ imprint).

- C. Additional costs and efforts include acquisitions editorial development of the book, typesetting, copyediting, and marketing expenses. As UPF staff assigns hard numbers to overhead expenses, it will be possible to determine how many print copies must be sold to recoup costs. Additional approval is required before work may begin to create/refine the work. Part of this process will involve commissioning external reviews of written content throughout the project development stages. Upon completion of the final manuscript, the original, never-before-published project will proceed through the steps outlined in approach 1 above.

Recommendation (3): The OATTF endorses the proposed plan for the review and approval of open access textbooks that has been developed and implemented through the Orange Grove Texts *Plus* initiative based on publisher practices.

Given the tasks and associated costs required to produce new and adapted open access materials, funding is needed to support these efforts. Task Force members suggested that a funded competition to develop a few textbooks could have a positive impact on textbook availability and also be a good demonstration project for promoting additional open text development. Possible sources of funds were seen as: the State of Florida, technology fees, professional academic organizations (particularly in newer fields), federal organizations, and private foundations and granting institutions. Student governments might also support a textbook development project.

Recommendation (4): The OATTF recommends that the Florida Distance Learning Consortium coordinate interested individuals or groups that will investigate and identify funding sources to support a competition to develop open access materials for prioritized Florida courses. This recommendation is not to the exclusion of efforts to seek external support for textbook development and peer review.

Factors Affecting Faculty Development of New Works of Open Access Materials.

When asked (in the OATTF faculty survey) if they were willing to develop open access materials, faculty responses showed they were slightly more likely to develop supplemental materials than textbooks. The factors affecting their decision to develop any open materials were, in order of priority:

- 1) time to review, find, select materials;
- 2) hardware and software to facilitate development;
- 3) desire to reduce student costs;
- 4) assurance that their materials are peer-reviewed and edited;
- 5) availability of the review criteria to the authors; and
- 6) administrative support for efforts.

Also important to both university and college faculty were recognition of such efforts for promotion and innovation.

The task force believes that it is important to address the above issues that represent institutional responsibilities, state policy issues and quality review and production issues which will be addressed through multiple recommendations contained within this report.

Forty-one percent of survey respondents (n=1887) reported that their institutions do not recognize digital products for tenure and promotion. Of those institutions that do consider digital products for promotion and tenure, universities consider peer-reviewed digital journal articles or combinations of different types of digital works (such as supplementary materials like workbooks or lab manuals; journal articles; primary texts) for promotion and tenure. Florida colleges, by the greatest proportion, were reported to consider combinations of digital works or other educational materials for promotion and tenure. Peer-reviewed digital textbooks are only considered by 2.4% of university-institutions, and 0.7% of college-type institutions. These findings point to the need for greater institutional recognition in order to promote development of open textbooks among Florida faculty. Yet, the criteria and process for evaluating digital scholarship in tenure and promotion decisions is unclear.

Recommendation (5): The OATTF recommends that both the Division of Florida Colleges and the Board of Governors appoint appropriate academic representation to develop and recommend review criteria or guidelines for the inclusion of digital scholarship in tenure and promotion decisions. The Florida Distance Learning Consortium will research and identify similar policies or criteria currently in use or in development.

3. Raise Awareness of Open Access Textbooks

A survey of Florida faculty and academic administrators conducted by the OATTF indicates that **over half of respondents were “not at all familiar” with open access textbooks, and only 12% had ever used any type of open materials.** These data support the idea that an intensive information and awareness effort is needed to inform Florida faculty of the value of digital collaboration/production and to encourage the adoption of open textbooks.

The OATTF members had a number of suggestions for raising awareness about open texts. The awareness campaign should include making faculty aware of the current student financial burden to purchase textbooks and cost savings realized by using OGT+ texts. Some faculty and students are unaware of textbook costs and most students don't know how textbooks are selected. Making faculty and students aware of open textbook options could result in student financial support of open texts.

While costs savings is an important consideration, it should not be the primary marketing focus. Rather, it was felt that faculty would respond best to an approach emphasizing the opportunity for academic innovation and opportunities for publishing with a highly respected press (UPF). Institutions might involve their teaching and learning centers in this initiative, and have faculty demonstrate their open content projects to other faculty. The options to customize open access materials also supports academic freedom to select resources faculty wish to use for teaching. It is important to avoid any statewide or institutional mandates of individual textbook selection for individual courses. Instructors must maintain the freedom to adopt and/or enhance materials appropriate to their instructional mission.

The Orange Grove is currently collaborating with the Community College Consortium for Open Educational Resources (CCOER; website: <http://oerconsortium.org/>) on a Hewlett Foundation grant for an open textbook awareness campaign that pays faculty advocates a \$1500 stipend to learn more about open textbooks and then hold a face-to-face workshop on their local campus to encourage and assist faculty to adopt open textbooks. The potential success of this strategy is confirmed by our OATTF survey finding that faculty would prefer to learn about open textbooks in a face to face setting. Several CCOER/Orange Grove workshops have been scheduled to train advocates and potential textbook adopters. One workshop was held in Orlando on January 26, 2010, another at St. Petersburg College on January 28, 2010 and a third at Broward College on February 1, 2010. Over 60 Florida faculty members and administrators participated.

Awareness of open access textbooks and materials can have a major impact. Having become familiar with Open Access Materials through The Orange Grove digital repository and participation in the OATTF, an FSU College of Medicine librarian formed a taskforce of all the library directors at the colleges of medicine in Florida to discuss methods for collaboration among medical schools in the development and sharing of open educational resources. The Florida State University College of Medicine has also created a campus taskforce of leaders in medical education at FSU to facilitate discussions on the feasibility of open access educational resources to support its curriculum. (See Appendices H and I for background information on both taskforces.)

Recommendation (6): The OATTF recommends that the Florida Distance Learning Consortium develop professional development materials, a media kit and offer an awareness campaign on individual campuses that will raise awareness of and promote the use of open access textbooks and instructional materials. The focus should be to offer a wide selection of teaching resources for selection, modification and/or reuse, while still preserving the principle of academic freedom. Media kits should be sent to local student media sources.

Recommendation (7): The OATTF recommends that faculty be encouraged to contribute a textbook to an institutional or statewide foundation by providing a federal income tax charitable contribution credit. The value of the tax credit would be established by the University Press of Florida.

4. Adoption and Use of Open Access Textbooks

OATTF survey findings showed that **Florida college faculty are more likely to develop and to use** open access materials than university faculty. **Florida university faculty and administrators were “somewhat more likely” to use open access materials** than college faculty.

The most highly ranked influence upon a decision to use open access materials was:

- 1) “academic quality” followed by (in rank order)
- 2) “time to find, review and select open materials;”
- 3) “knowledge about open materials;” and
- 4) “desire to reduce costs to students.”

The factor that had the least influence upon the decision to use open access materials was its ‘impact upon the campus bookstore.’ This factor was rated lowest by both faculty and administrators.

Barriers to open textbook adoption identified in the OATTF survey were: quality (first and foremost), time to find, review and select open materials, and, finally, lack of knowledge about open materials.

The OATTF members concurred that some incentives would be needed to encourage widespread faculty adoption of open access textbooks. Commercial publishers often meet directly with the faculty, promoting packaged course materials, and eliminating the need for faculty members to expend time and energy on textbook selection. Trial textbook copies are provided at no charge. This suggests that comparable endeavors could be supported for open access textbooks.

The recently released 2010 Horizon Report confirms the need for institutional incentives. “Many believe that reward structures that support the sharing of work in progress, ongoing research, highly collaborative projects, and a broad view of what constitutes scholarly publication are key challenges that institutions need to solve. Also to be addressed are reputation systems, peer review processes, and new models for citation of the new forms of content that are likely outgrowths of open content initiatives.” Johnson, L., Levine, A., Smith, R., & Stone, S. (2010). *The 2010 Horizon Report*. Austin, Texas: The New Media Consortium.

Faculty incentives could include recognition, faculty stipends, student assistants, release time, grant awards, professional development, or additional technology. Institutions are strongly encouraged to raise awareness of pioneering instructors introducing open textbooks for their students or spotlighting innovative initiatives in technology areas. One example of an incentive program is being piloted at the University of West Florida. Monetary awards are made to faculty research and development accounts, based upon the percentage of savings for students by an instructor’s textbook(s) adoption.

Recommendation (8): The OATTF recommends that institutional leadership be informed regarding barriers and incentives needed to encourage significant faculty adoption of open textbooks and asked to explore, enhance and report on successful institutional specific incentives that promote digital academic involvement. These incentives should integrate with existing institutional recognition systems to acknowledge digital scholarship.

Building on the information gathered through the awareness campaign and the establishment of the criteria for tenure and promotion, the Florida Distance Learning Consortium could develop and coordinate a statewide recognition program that is competitive and designed to identify excellence in the creation of open digital resources, to develop best practices in instruction and to capture and benefit from the knowledge of successful faculty. For example The University System of Ohio offers an annual competition, *Faculty Innovator Awards*, that rewards and stimulates the creation of innovative, affordable instructional materials to reduce the cost of textbooks to students. Ten winning recipients receive a \$1,000 cash award. Any college, university, or adult

career center faculty can be nominated by other faculty, students or administrators. (<http://ohiotextbookhq.ning.com/>)

Recommendation (9): The OATTF recommends that the Florida Distance Learning Consortium request nominations for a statewide committee that will recommend, develop, and establish a statewide recognition system that evaluates such criteria as: high quality contributions of open access textbooks and materials, increased student performance through the use of open access materials, increased student satisfaction, or the decrease in costs for student course materials. Faculty and staff recognized for this honor would be invited to participate in a wide range of roles and their work publicized.

5. System Security

There are various issues and options associated with securing electronic media – specifically digital/electronic textbooks in a database repository – the risks and options, and how to mitigate the risks associated with this media.

Digital/electronic textbooks stored in a database face the same security issues in protecting any sort of data/information in a database – protection of that data while it is in the database and, depending on the data, protection on its way in and out of the database.

Protection for data already in a database (mitigating risk of data loss and theft/improper use) is provided through a variety of methods. These methods can include encryption of the data while in the database, database level security through database access controls (including but not limited to role based security), real time transaction auditing, and virtual private databases. Data is also protected through connection security methods such as placing the database behind a firewall, using trusted IP addresses, turning off unneeded ports and a plethora of other activities that can be done at the network and database level. Lastly, the application layer security sits on top of the database and can add (or detract if done poorly) from the security of the data. The foregoing description is part of the standard practice of securing a database including backup and recovery.

Securing the data into and out of the database is usually a matter of transmission security (such as using Secure Sockets Layer (SSL), proper user authentication (usually part of application layer security) and detection of hostile/malformed data through the use of virus protection/malware tools.

Digital media differs when it comes to security in that digital media often have rights attached to them that must be respected when the data is removed from the database. This applies to all digital creative products e.g. music, film and books. Decisions about how intensely one wants to protect these rights will determine to what lengths one must go in protecting the data outside of the database once it is in the hands of the consumer.

One may want to take more responsibility for protection of rights by allowing their work to be made available but not to be modified in any way. In this case, placing a physical limiter on the media such as placing a document in Portable Document Format (PDF) and using the security features available with that format; one can theoretically prevent

modification of the document (but not prevent multiple distributions of the media). This is a theoretical statement because there is no known sort of security that will completely protect a piece of digital media once it is in the hands of the consumer. The same is true for non-digital copyrighted materials.

One can adopt a proprietary format for the digital media and require a special device to read it thus providing greater barriers to modification and redistribution. This is the method used with the Amazon Kindle, Sony eBook Reader, and others. This method is effective for limiting the redistribution of the media but as mentioned before – no method is foolproof.

Lastly, one can take steps that allow the digital media to be read on multiple types of devices but requires the consumer (willingly or not) to place some sort of software on his/her personal device that will allow the media to be read but, more importantly, restricts the media in some way in an attempt to manage the digital rights associated with the media. This method is very popular with the music and computer gaming industry, but consumers have a great distaste for this type of digital rights management.

In summary, aside from the normal security procedures that should be associated with the implementation of a database to act as a repository, the methods for securing digital media is directly related to the degree one wishes to protect the rights associated with the media. There are various methods of securing the media once in consumer's hands ranging from mild to what some consider draconian depending on how intense the desire is to protect the digital rights of the publisher.

Recommendation (10): The OATTF recommends the continued use of repository software to ensure system protection that makes the rights statement and terms of use clearly visible to the consumer.

6. Sustainability

Although this topic is not explicitly required in the open access legislation, the Task Force considers sustainability a critical issue for the success of open access textbooks. The activities described in the above plan have an associated cost as evidenced by the launch of the Orange Grove Texts *Plus* (www.theorangegrove.org) project during fall, 2009. However, even these costs are greatly reduced by using existing Florida non-profit support organizations and their infrastructure such as The Orange Grove Digital Repository and the University Press of Florida. The costs include the maintenance fee for the repository software and the infrastructure to provide high speed, on-demand access to the open textbooks and the services of the University Press of Florida to ensure high quality textbooks – both in content and technical publishing standards. The beneficiaries of this project are our faculty, our students, their parents and ultimately our state economy through an improved, affordable higher education.

To provide the human, technical and hardware resources required to support the system, there must be dedicated and reliable funding. The open textbook initiatives are currently pressing traditional publishers to negotiate lower pricing agreements with institutions. This willingness to negotiate requires continued support for open access texts in our state, if even for a few high enrollment courses.

A number of financial models have been discussed and are offered for consideration below. It is expected that institutions may need to choose from financial models given the size and differences among educational systems, institutions, faculty and students. Listed below are some of the models for consideration:

- **Overhead Support Fee.** Currently, the sustainability model for OGT+ builds an overhead support fee into the cost of print copies. This means that students purchasing an OGT+ textbook pay a fee included in the printing costs to support sustainability of both the repository and the press. Students can still download or self-print a book at no cost. However, this model does not provide a reliable and equitable funding base for open access textbooks in Florida. It places the burden to support the system only on the students that purchase a printed textbook.
- **Lab Fees.** The fairest model that has emerged is a small course fee, similar to a lab fee that is assessed to students enrolled in a course in which a faculty member adopts an open access textbook. The textbook would still be available for a low cost for download or self-printing or students could choose to purchase a print copy based ONLY on print cost recovery. In this model, all students using the textbook in a course would sustain the infrastructure, development, and review costs for open access textbooks. Other variations would include a small portion of student technology fees supporting the project.
- **Student Government Support.** Student government associations could support the use and development of specific textbooks, workbooks or associated materials as a line item in their budgets. Florida SGA may be willing to provide funds to help support the infrastructure for open access textbooks.
- **Institutional Support.** Institutions could financially support the use of open textbooks by managing a textbook development project with editorial support provided by the University Press of Florida through sabbatical or partial release time. Departments could choose to author textbooks with a negotiated percentage of revenues returned to the department for future text development, revision and maintenance. Some institutions could hire faculty to develop to develop and revise textbooks as “a work for hire”. Educational institutions may be willing to provide funds to help support the infrastructure for open access textbooks.
- **Collaboration.** Collaborative work with other states or professional organizations to share the costs for finding, developing and peer reviewing open access textbooks could provide options for Florida’s faculty at a reduced cost to the state for development.
- **Private Support.** Private foundations or corporations could be requested to support the purchase of rights or the development of a specific textbook for which there is an identified need. For example, a Rice University trustee, through his foundation, purchased the rights to ***Collaborative Statistics***, a commercially available textbook, which is now available as an open access textbook for anyone in the world to use.

The OATTF recognizes that it is essential to achieve financial sustainability for open access textbook initiatives, such as the OGT+ system, that are provided to Florida’s educators. The OATTF also acknowledges that given the size and differences among educational systems, institutions, faculty and students, institutions may need flexibility to choose an appropriate financial model to support open textbooks.

Summary and Conclusions

Textbooks are an essential part of higher education, enriching the classroom experience in many ways. However, the high cost of publisher textbooks has become a widespread concern for students, faculty and administrators, and, in some instances a barrier to obtaining an education. For example, at one large Florida college, 22% of the students responding to a recent informational survey reported that they have dropped or failed a class because required course materials were too expensive for them to purchase.

In response to Florida Statute 1004.091(2), a collaborative study was undertaken by a 23 member task force to develop a plan to promote and increase the use of open access textbooks, as a possible strategy to reduce student textbook costs. The legislature was very timely in its request for this study, given that the respected 2010 "Horizon Report" predicts that open educational resources - and in particular, open access textbooks - will be a mainstream activity by the end of 2010.

The task force survey data was especially valuable, identifying faculty and student government leader concerns that must be addressed for a successful open access textbook initiative. Shared faculty concerns include: the lack of awareness or use of open access textbooks, assurance of academic quality, peer review and editing, institutional recognition for efforts in creating and developing open access materials, and challenges in allocating time for these activities. Student government association leaders' highest ranked concerns were the quality of open access textbooks and their cost. While the majority of students had not used open access textbooks, they indicated their desire to purchase a print textbook. These faculty and student concerns were carefully considered when developing the open access textbook plan and associated recommendations which are intended to overcome these apprehensions.

The task force greatly benefited from the opportunity to study the emerging Florida initiative for open access textbooks, Orange Grove Texts *Plus*, which builds on existing infrastructure - the University Press of Florida and The Orange Grove Digital Repository, a project of the Florida Distance Learning Consortium. The repository stores and manages open access textbooks for persistent access, use, download or purchase of a print copy. It can integrate into the campus learning management system for additional ease of use. The University Press of Florida ensures that high quality open access textbooks are available for faculty review, use, customization, print-on-demand publishing and purchase by bookstores. Together, these entities are in a unique position to provide coordination and communication among institutions related to open access textbooks. Significant progress has been made thus far; significant work remains to be done.

Recommendation (11): The OATTF recommends that the Florida Distance Learning Consortium monitor and annually report on the adoption rate open access textbooks, progress of the initiative, and satisfaction of faculty and students regarding their use of open access textbooks.

This report is the collective work of a committed and hard working task force. Special thanks goes to Dr. Ida Cook, University of Central Florida, for her analysis and summary of the survey data.

Overall, the Open Access Textbook Task Force believes that open access textbooks are a viable solution and an unparalleled opportunity to decrease student textbook costs, utilizing options such as Orange Grove Texts *Plus*, an innovative partnership between the University Press of Florida and The Orange Grove Digital Repository. This task force urges the legislature to consider the plan and recommendations in order to promote and sustain open access textbooks as one option for reducing textbook costs in the State of Florida.

Appendix A

Open Access Textbook Task Force Members

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Appendix B

Report of Results of Open Access Materials Survey of Faculty and Administrators

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B1: Survey Results for University, State and Community College Faculty and Administrators

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Purpose

The purpose of this study has been to collect information from university, state and community college faculty and administrators and from student government leaders regarding their knowledge, awareness and opinions about open access textbooks, supplementary materials and other digital education products. The Open Access Textbook Task Force established two separate online surveys in order to assist the Task Force in developing information to address access and affordability of learning materials for higher education students in the state of Florida. The first survey gathered responses from a statewide higher educational faculty and administrators and a second survey gathered information from student government leaders. This appendix presents the results of the faculty and administrator survey.

Questions regarding information about educators' perceptions of online materials were included in a structured online survey of faculty and administrators (see Appendix C). The questionnaire was administered online using a program (Survey Monkey¹) to allow for anonymous responses. The design of the study included questions to more precisely determine factors influencing the use, adoption and development of online educational materials. The objectives of the study were as follows:

1. To provide feedback about higher educators':
 - a) awareness of existing online educational materials.
 - b) knowledge of online educational materials.
 - c) experiences and perceptions of online educational materials.
2. To provide information about higher educators':
 - a) use of online educational materials
 - b) likelihood of using and factors influencing the use of online educational materials
 - c) likelihood of developing and factors influencing development of online educational materials
 - d) preferences of mechanisms to educate higher educators about online educational materials
3. To make recommendations based on these findings.

¹ Survey Monkey Copyright ©1999-2010 SurveyMonkey.com.

A team of Task Force members developed the survey, which was administered between October 6 and 28, 2009. Final analysis of the data and preparation of the report of survey results were performed by Ida Cook, Ph.D., Associate Professor of Sociology, University of Central Florida and Open Access Textbook Task Force member.

Methodology

The Board of Governors and the Florida Division of Colleges forwarded a cover email and a link to the online survey to all Florida public higher education institutional administrators, with a request to distribute the email and survey link to their institution's faculty and administrators. The high-level administrators receiving this request included provosts and faculty senate presidents. The cover email included an assurance that survey responses were anonymous and confidential. Information collected from the survey included answers about the following topics:

1. Who selects textbooks/materials for courses taught
2. Familiarity with open access textbooks, supplements and other digital materials
3. Whether or not the respondent had ever used open access textbooks, supplements and other digital materials
4. Respondents' attitudes about the:
 - a) Likelihood of use of open access textbooks, supplements and other digital materials
 - b) Likelihood of developing open access textbooks, supplements and other digital materials
5. Important factors that would influence the educators' decision to use open access textbooks, supplements and other digital materials
6. Important factors that would influence the educators' decision to create open access textbooks, supplements and other digital materials
7. Information about which factors are considered at the educators' local institution in determining partial satisfaction of scholarly production for promotion and tenure
8. Whether or not educators had developed or were currently developing any materials for open access
9. Respondents interest in open access topics and preference of setting/medium by which they could learn more about open access textbooks, supplements and other digital materials
 - a) General information about open access textbooks
 - b) Guidelines for finding and selecting open access materials

- c) Guidelines for authoring open access materials
 - d) Open access text materials (guidelines, stipends and process)
 - e) Copyright and intellectual property related to open access textbooks, supplements and other digital materials
 - f) Royalties related to open access textbooks, supplements and other digital materials
 - g) Work with teams to develop open access textbooks, supplements and other digital materials
 - h) Promoting recognition of open access textbooks, supplements and other digital materials
10. A separate set of questions was asked of educators who had actually used open access textbooks, supplements and other digital materials, including questions about:
- a) The number of open access textbooks, supplements and other digital materials they had used
 - b) Educators' perceptions comparing the open access textbooks, supplements and other digital materials to regular texts in terms of:
 - 1) Quality
 - 2) Value
 - 3) Cost reduction
11. Demographics of all respondents, including:
- a. Educational institution
 - b. Type of educational institution
 - c. Position at educational institution
 - d. Discipline taught
 - e. Level of study taught

Data Collection and Analysis

Institutional leaders were sent a notification letter by e-mail the Board of Governors and the Chair of the Advisory Council of Faculty Senates (universities) and the Division of Florida Colleges. The email letter included a link to the survey, and a request that faculty/administrators complete their responses between October 6th and 28th. (See Appendix C for specific wording of questions.) A total of 2707 respondents completed the survey. Information for both the closed-ended and open-ended questions was compiled and computer analyzed. This section of this appendix (B-1) provides and discusses tables and charts depicting the Open Access educators' survey results using frequency calculations, average ratings and comparisons, where appropriate. For information about the perception and uses of open access materials by those faculty and administrators who had actually used the materials for their courses, see Appendix B-2.

Results

The following discussion presents the analysis of results taken from the educators' responses to the online, self-administered survey. Tables and charts display results in percentages, as well as average ratings or rankings for answers about certain topics, according to university or college category.

- Section 1 presents information on the **characteristics** of the respondents in the sample, their **institutions**, and **levels taught**.
- Section 2 presents information about **awareness** of open access materials and their use
- Section 3 discusses **perceptions and attitudes** of faculty and administrators about open access materials.
- Section 4 presents information about **perceptions and attitudes** of faculty and administrators regarding the **development or creation** of open access materials.
- Section 5 offers insights into the materials considered by different types of institutions when faculty are reviewed **for promotion and tenure**.
- Section 6 describes the different **preferred settings or mechanisms** via which respondents can obtain more information about open access materials.

Section 1: Sample Characteristics

Respondents by Type of Institution

As indicated above, 2707 educators responded to the online survey. Table 1 and Figure 1 present the distribution of respondents by type of institutional affiliation. A greater proportion of respondents were from universities (57%) than from state and community colleges (43%).

Figure 1. Proportion of Respondents by Type of Institution

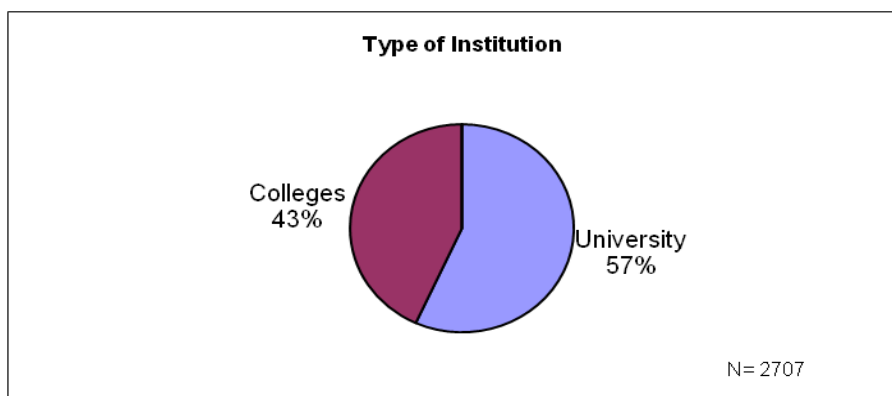


Table 1. Proportion of Respondents by Type of Institution

Type of Institution	N	Percent
University	1537	56.78%
Colleges	1170	43.22%
Total	2707	100%

Institutional Affiliation

Faculty from all state universities were represented in the survey results (see Table 2a and Table 2b). Table 2b provides a distribution of respondents among the state and community colleges. A total of 26 State and Community Colleges and all eleven universities were represented in the survey results. Results show that, while some institutions were more heavily represented in the study, it appears that educators throughout the state participated in the online survey.

Table 2a. Institutional Affiliation - Universities

Universities	N	Percent
UCF	267	17.4%
FAMU	6	0.4%
FAU	181	11.8%
FGCU	72	4.7%
FIU	115	7.5%
FSU	358	23.3%
New College	2	0.1%
UNF	86	5.6%
UF	334	21.7%
USF	18	1.2%
UWF	98	6.4%
Total	1537	100%

Table 2b. Institutional Affiliation – State and Community Colleges

State Colleges/Community Colleges	N	Percent
Brevard CC	45	3.8%
Broward College	64	5.5%
Central FL CC	59	5.0%
Daytona State College	150	12.8%
Edison State College	1	0.1%
FL Keys CC	8	0.7%
Florida State College @ Jacksonville	88	7.5%
Gulf Coast CC	31	2.6%
Hillsborough CC	41	3.5%
Lake City CC	4	0.3%
Lake-Sumter CC	1	0.1%
Indian River State College	27	2.3%
Miami Dade College	113	9.6%
Northwest Florida State College	1	0.1%
Palm Beach CC	69	5.9%
Pensacola Junior College	56	4.8%
Polk State College	14	1.2%
St. Johns River CC	21	1.8%
St. Petersburg College	194	16.5%
Santa Fe College	23	2.0%
South Florida CC	8	0.7%
State College of FL, Manatee-Sarasota	26	2.2%
Tallahassee CC	48	4.1%
Valencia CC	43	3.7%
North FLCC	8	0.7%
Seminole State College	30	2.6%
Total	1173	100.0%

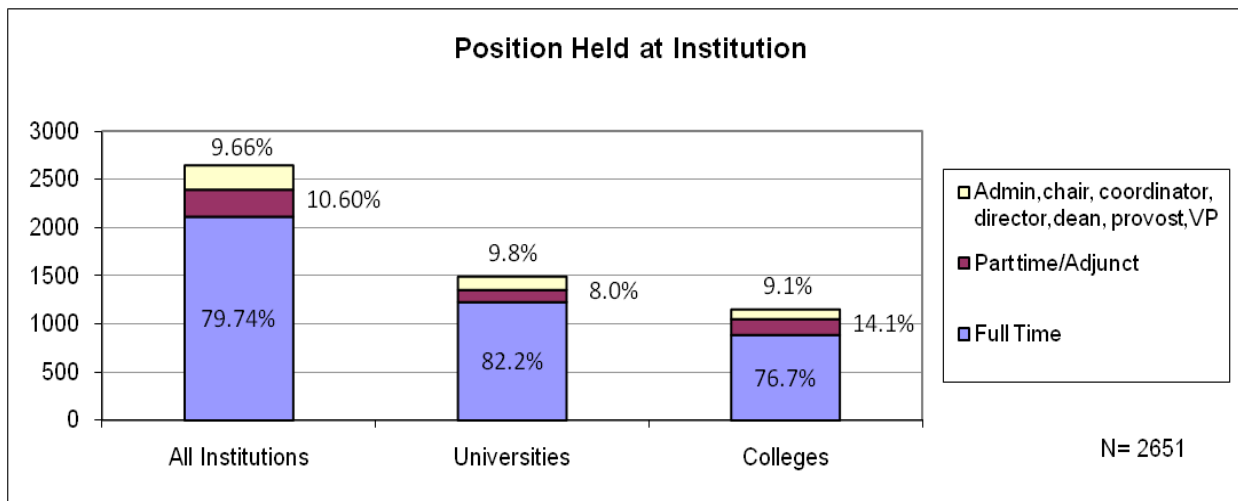
Position Held at Institution

The survey also asked respondents to indicate the type of position that they held at their respective educational institutions. (See Table 3 and Figure 3). A large proportion of respondents to the survey were full time faculty; however approximately ten percent of the respondents were administrators, and the remainder were part-time or adjunct faculty.

Table 3. Position Held at Institution

Position	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
Full Time	2114	79.74%	1232	82.2%	891	76.7%
Part time/Adjunct	281	10.60%	120	8.0%	164	14.1%
Administrator, chair, coordinator, director, dean, provost,VP	256	9.66%	147	9.8%	106	9.1%
Total	2651	100	1499	100	1161	100

Figure 3. Position Held at Institution



Level at which Respondents Teach

The following Table 4 and Figure 4 present the level of education in which respondents offered courses.

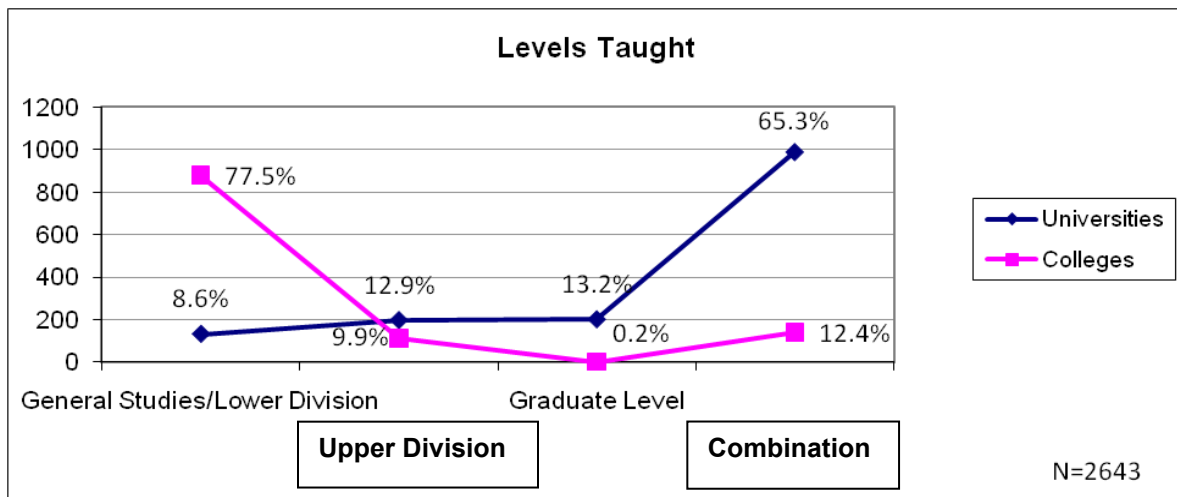
- Based upon the above data, more than three-quarters (77.5%) of the state college and community college respondents taught general studies or lower division courses.
- Almost half of the university respondents (42.9%) taught a combination of lower, upper level and graduate courses.
- Slightly over one-third of university respondents (37.7%) taught general studies or lower division courses.

Based upon the broader sample of education respondents of university faculty, this difference in courses taught is reasonable.

Table 4. Level at which Respondents Teach

Levels at which teach	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
General Studies/Lower Division	997	37.72%	131	8.6%	880	77.5%
Upper Division	308	11.65%	196	12.9%	112	9.9%
Graduate Level	205	7.76%	200	13.2%	2	0.2%
Combination Lower/Upper/Grad	1133	42.87%	991	65.3%	141	12.4%
Total	2643	100	1518	100	1135	100

Figure 4. Level at which Respondents Teach



Who Selects Textbooks for Courses?

Based upon the survey results, there is a major difference in how textbooks are selected between types of institutions (See Table 5 and Figure 5).

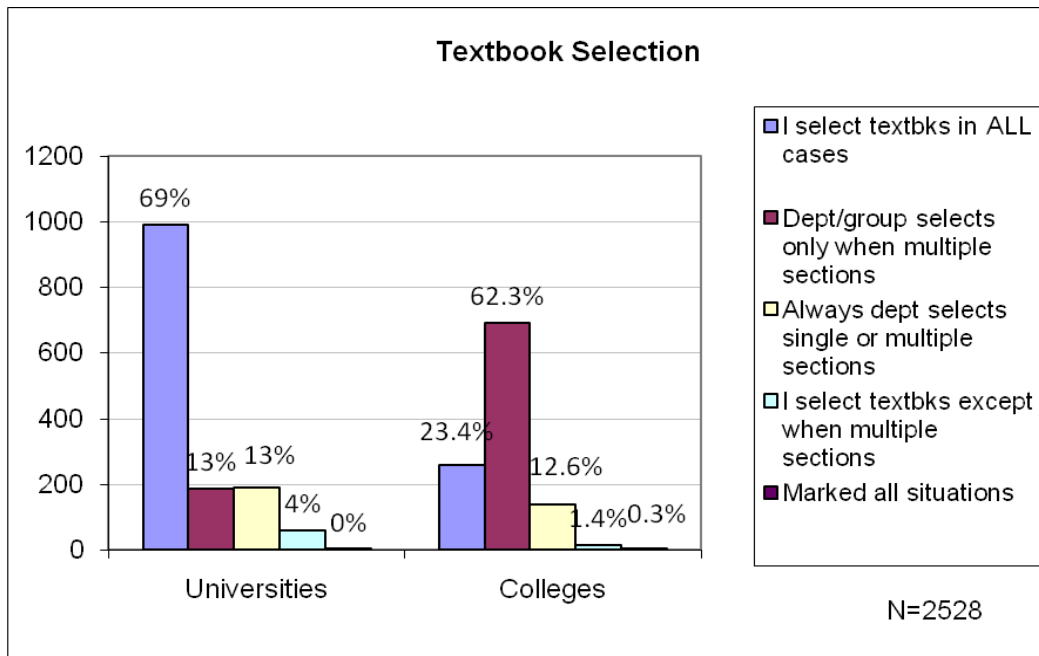
- Almost half of all respondents (49.7%) from universities reported that they select all the textbooks in all their classes.
- State and community college respondents reported that when multiple sections are being taught, over half of textbook selections (62.3%) are made by the department or a group of faculty.

- A possible explanation of this difference may be due to the organizational structures of the two types of educational institutions

Table 5. How Textbooks are Selected?

How Textbooks selected?	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
I select textbooks in ALL cases	1256	49.7	990	69%	260	23.4%
Dept/group selects only when multiple sections	274	10.8	188	13%	691	62.3%
Department always selects single or multiple sections	867	34.3	192	13%	140	12.6%
I select textbooks except when multiple sections	77	3	60	4%	16	1.4%
Marked all situations	54	2.2	1	0%	3	0.3%
Total	2528	100	1431	100%	1110	100.0%

Figure 5. How are Textbooks Selected?



Section 2: Open Access Awareness and Use

Familiarity with Open Access Textbooks

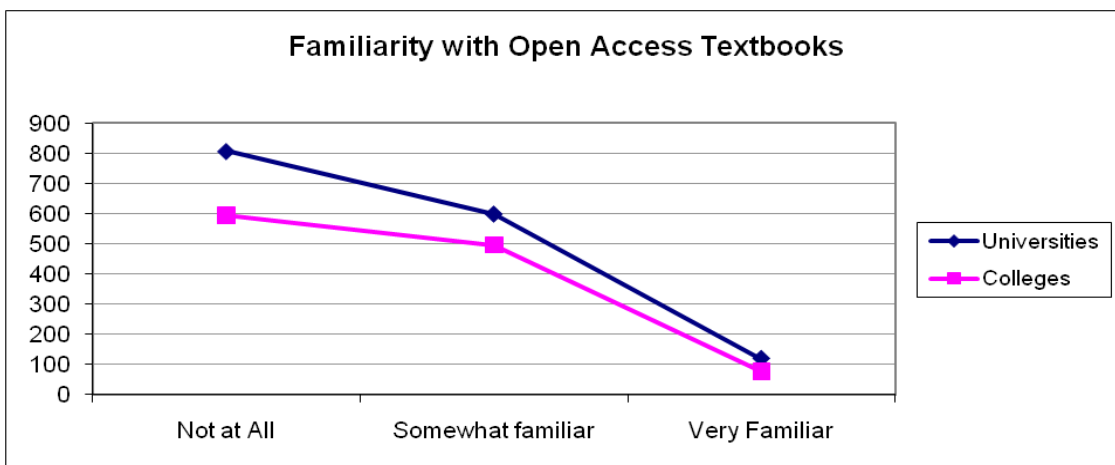
When respondents were asked whether or not they were familiar with open access textbooks, almost equal proportions of college and university respondents said they were unfamiliar with open access textbooks. More specifically:

- Slightly more university respondents (52.9%) than college respondents (50.9%) indicated they were not at all familiar with these materials.
- Slightly more college respondents (42.5%) said they were somewhat familiar with open access textbooks.
- When familiarity with these materials by administrators were compared to the other survey respondents, a higher proportion of administrators (51%) were familiar with open access materials, and 36.5% were not at all familiar with them.

Table 5. Familiarity with Open Access Textbooks

Familiar with Open Access Textbooks?	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
Not at All	1400	52.1%	807	52.9%	595	50.9%
Somewhat familiar	1088	40.5%	599	39.3%	496	42.5%
Very Familiar	197	7.3%	119	7.8%	77	6.6%
Total	2685	100%	1525	100%	1168	100%

Figure 5. Familiarity with Open Access Textbooks



Use of Open Access Materials

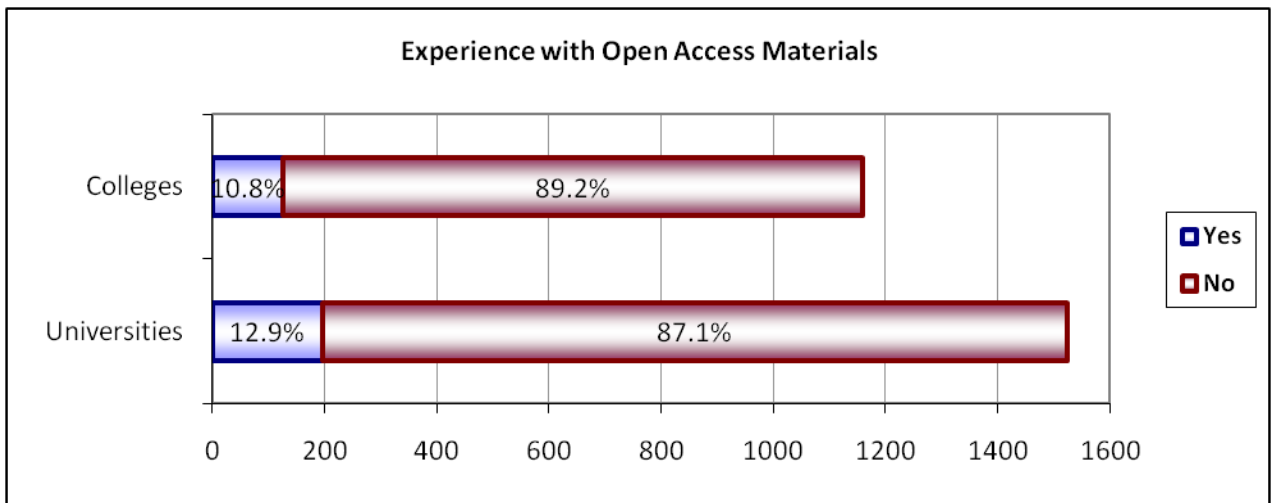
A very large proportion of all survey respondents (87.9%) reported they had never actually used open access materials.

- Of those who used open access materials, slightly more university (12.9%) than state and community college respondents (10.8%) reported having used open access materials.
- A pattern of usage comparable to university respondents was found for administrator respondents from both universities and colleges (12.4%).

Table 6. Actually Used Open Access Materials

Used Open Access Txt/Suppl/Other materials	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
Yes	322	12.1%	197	12.9%	125	10.8%
No	2350	87.9%	1326	87.1%	1033	89.2%
Total	2672	100%	1523	100%	1158	100

Figure 6. Actually Used Open Access Materials.



N=2672

Only 12.1% percent of respondents (n=322) indicated that they had ever used open access materials. Tables 7 through 9 and Figures 7 through 9 present the reported usage of open access materials by numbers and types of materials used as reported by those faculty who actually had used them. Because approximately 12 percent said they had used open access materials, this smaller subsample of respondents were asked a

separate set of questions to provide insight into specific benefits or difficulties that may be presented in using these materials, additional questions comparing the open access materials to traditional materials. For a discussion of their perceptions regarding the comparison of quality, value and cost reduction will be discussed in the next section (See Appendix B-2).

- For those faculty who reported they had experience with open access materials, the majority reported they had used “other” types of open access materials (89.2%) as compared to textbooks (49.6%) or supplementary materials (64.7%)
- Administrator respondents (n=221) reported higher rates of use of all types of open access materials than either university or state/community college respondents (57.1% open access “textbooks,” 66.7% open access “supplementary” materials, 79.2% “other” open access materials).

Table 7. Number of Open Access “Textbooks” Used

OA Textbooks Used:	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
None	120	50.4%	75	50.7%	48	52.2%
One or more	118	49.6%	73	49.3%	44	47.8%
Total	238	100%	148	100%	92	100%

Figure 7. Number of Open Access “Textbooks” Used

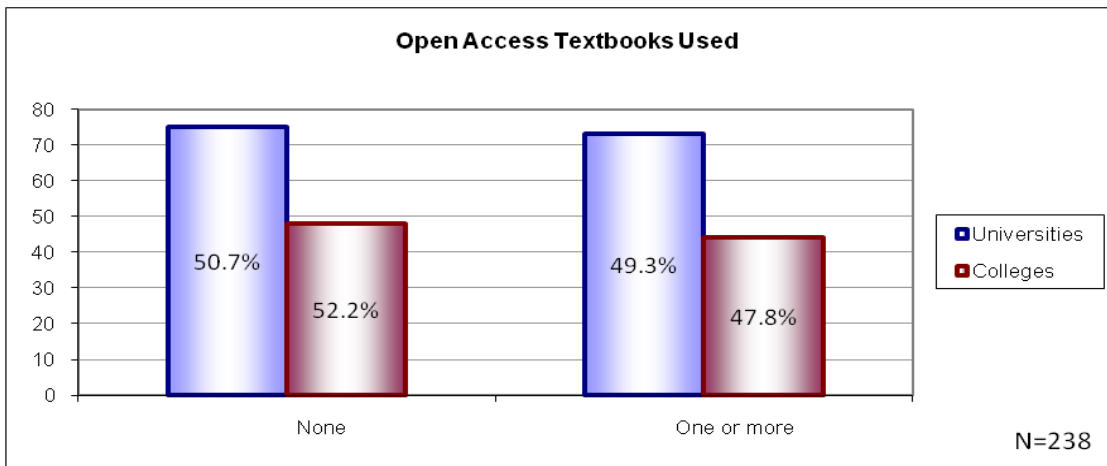
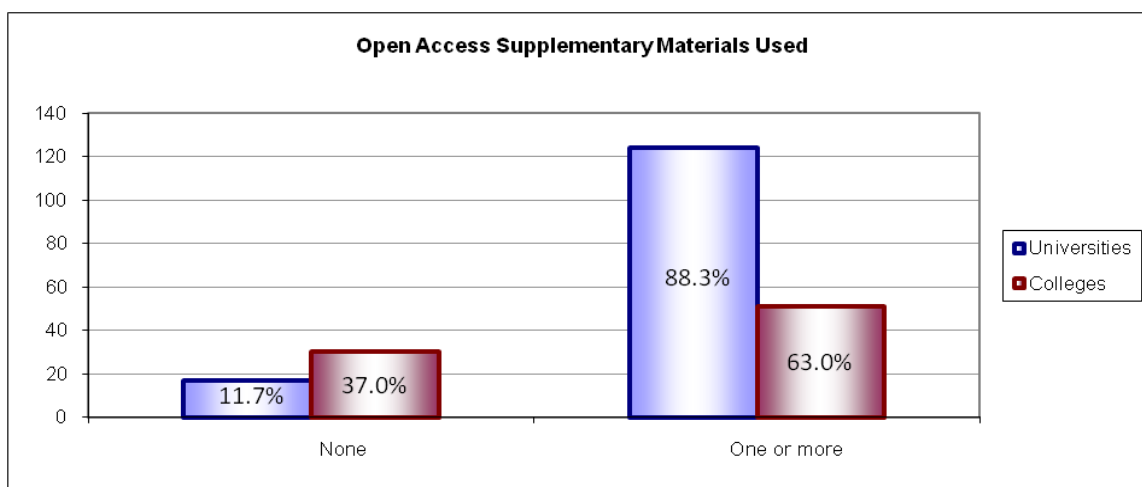


Table 8. Number of Open Access “Supplementary” Materials Used

OA Supplementary materials used	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
None	78	35.3%	17	11.7%	30	37.0%
One or more	113	64.7%	124	88.3%	51	63.0%
Total	221	100%	141	100%	81	100%

Figure 8. Number of Open Access ‘Supplementary’ Materials Used



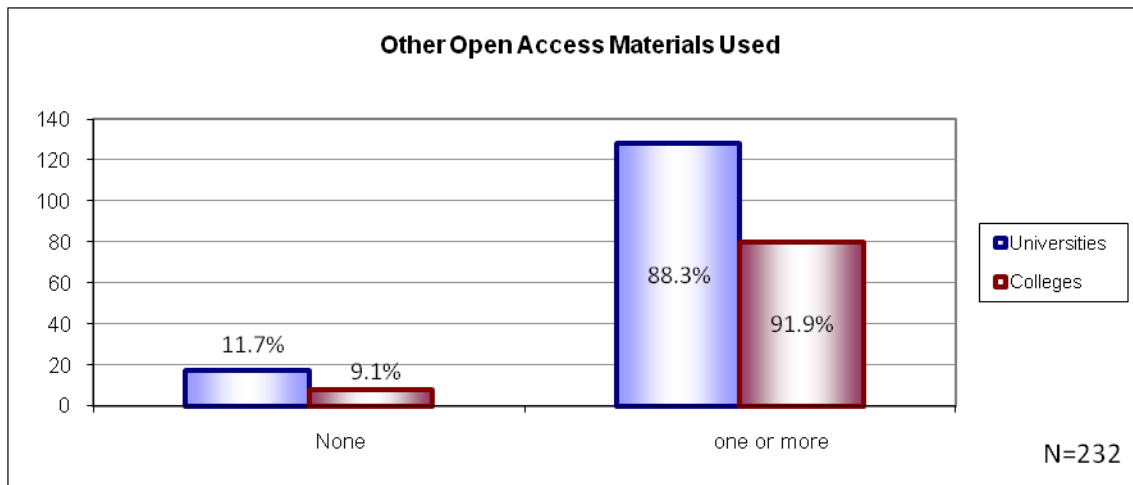
N=221

Table 9. Number of “Other” Open Access Materials Used

Other OA Course Materials Used	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
None	25	10.8%	17	11.7%	8	9.1%
One or more	207	89.2%	128	88.3%	80	91.9%
Total	232	100%	145	100%	88	100%

N= 232

Figure 9. Number of “Other” Open Access Materials Used



Section 3: Perceptions and Attitudes about Open Access Materials

Likelihood of Using Open Access Materials

All respondents (both those who had and had not actually used open access materials) were asked to rank the likelihood that they would use open access materials (See Table 9 and Figure 9).

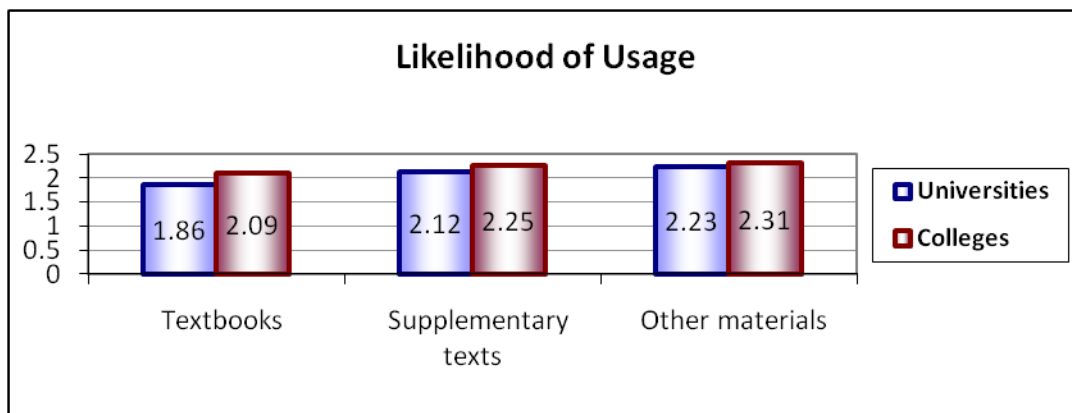
- The type of materials that had the lowest likelihood of use ranking was open access “textbooks (1.96 ranking),” followed by “supplementary” (2.18 ranking) materials.
- The highest ranked materials with the greatest likelihood of use were “other materials” (with a ranking of 2.26). However, it should be noted that these values are relatively close to each other, and all near the median of 2.0.
- Administrator responses mirror the state/community college patterns of likelihood of use of types of open access materials.
- The difference in average rankings between different types of materials is statistically significant for the total sample and between universities and colleges.

Table 9. Ranking of Likelihood of Using Open Access Materials N=2707

Ranking of Likelihood of Using OA Materials (1= Not at all likely; 3= very likely)	All Institutions	Universities	Colleges
Textbooks	1.96	1.86	2.09
Supplementary texts	2.18	2.12	2.25
Other materials	2.26	2.23	2.31

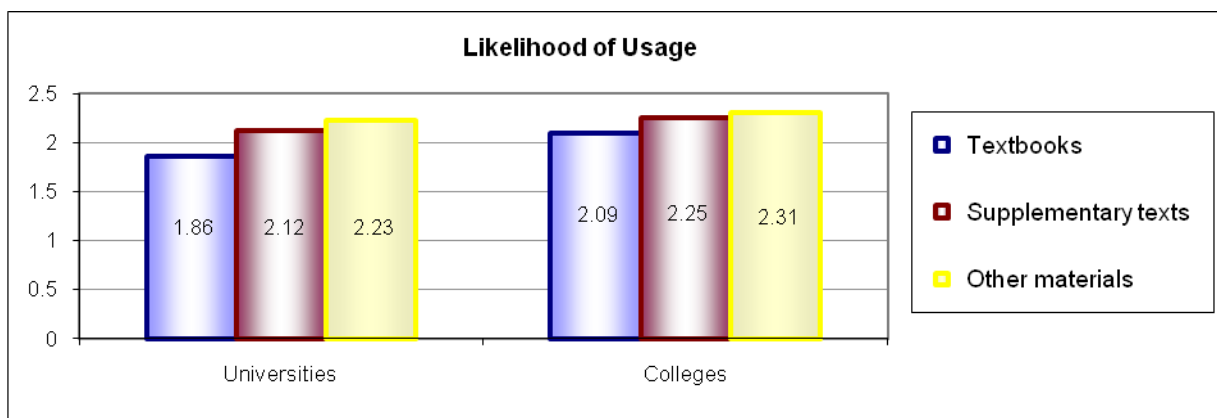
Figures 9a and 9b provide optional ways of comparing the relative likelihood of usage by type of institution.

Figure 9a. Ranking of Likelihood of Using Open Access Materials by Type of Institution



N=2707

Figure 9b. Ranking of Likelihood of Using Open Access Materials by Type of Institution



N=2707

Factors Influencing the Decision to Use Open Access Materials

Respondents were asked to rank different factors that might influence their decision to use open access materials. Universities and state/community colleges average rankings of the decision factors are compared in Table 10 and Figure 10 by. Tables 10a and 10b provide a rank order of factors by separate type of institution.

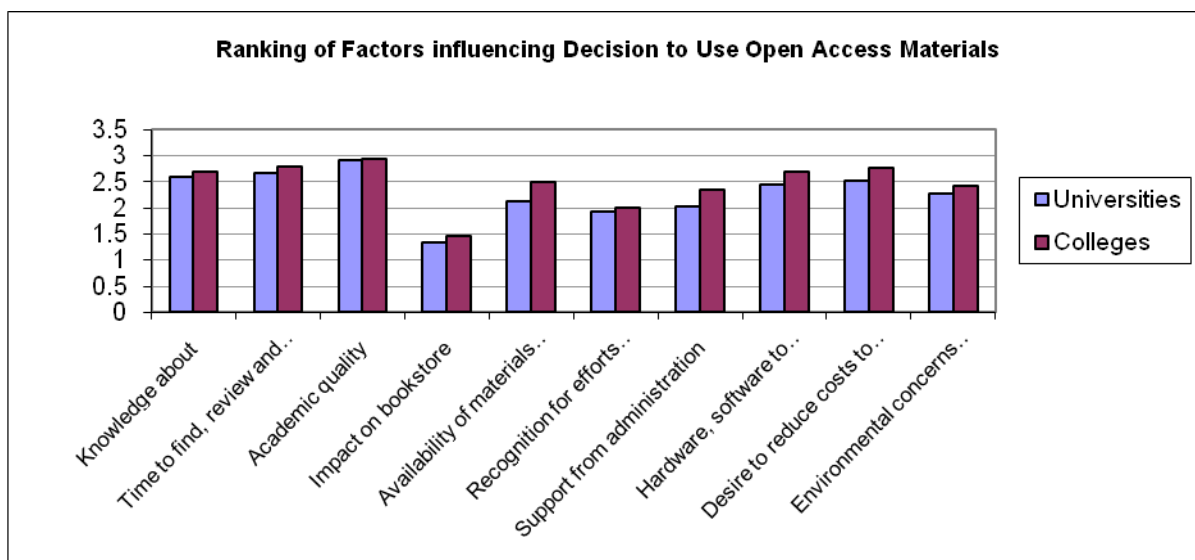
- Except for the factor, “time to find, review and select materials,” college respondents ranked all the decision items as more highly important than did the university respondents.
- The most highly ranked influence upon a decision to use open access materials was “academic quality.”
- The factor that had the least influence upon the decision to use open access materials was its ‘impact upon the campus bookstore.’ This factor was rated lowest by both faculty and administrators.

Table 10. Ranking of Factors Influencing Respondents’ Decision to Use Open Access Materials – Universities and Colleges

Rank of Factors influencing Decision to USE: (1= Not at all important.; 3=Very important)	All Institutions	Universities		Colleges	
	Average	Average	Rank	Average	Rank
Academic quality	2.92	2.91	1	2.94	1
Time to find, review and select	2.73	2.68	2	2.8	2
Knowledge about	2.64	2.6	3	2.7	4.5
Desire to reduce costs to students	2.64	2.53	4	2.76	3
Hardware, software to facilitate use	2.55	2.44	5	2.7	4.5
Environmental concerns (conserve paper, trees, landfill)	2.34	2.27	6	2.43	7
Availability of materials e.g., test banks	2.29	2.13	7	2.49	6
Support from administration	2.17	2.04	8	2.34	8
Recognition for efforts toward innovation	1.97	1.94	9	2.01	9
Impact on bookstore	1.38	1.33	10	1.47	10

N=2707

Figure 10. Ranking of Factors Influencing Respondents' Decision to Use Open Access Materials – Universities and Colleges



N=2707

Table 10a. Ordered Ranking of Factors Influencing Respondents' Decision to Use Open Access Materials – Universities

Rank of Factors influencing Decision to USE: (1= Not at all important; 3=Very important)	Universities	
	Average	Rank
Academic quality	2.91	1
Time to find, review and select	2.68	2
Knowledge about	2.6	3
Desire to reduce costs to students	2.53	4
Hardware, software to facilitate use	2.44	5
Environmental concerns (conserve paper, trees, landfill)	2.27	6
Availability of materials e.g., test banks	2.13	7
Support from administration	2.04	8
Recognition for efforts toward innovation	1.94	9
Impact on bookstore	1.33	10

N=2707

Table 10b. Ordered Ranking of Factors Influencing Respondents' Decision to Use Open Access Materials – Colleges

Rank of Factors influencing Decision to USE: (1= Not at all important;3=Very important)	Colleges	
	Average	Rank
Academic quality	2.94	1
Time to find, review and select	2.8	2
Desire to reduce costs to students	2.76	3
Knowledge about	2.7	4.5
Hardware, software to facilitate use	2.7	4.5
Availability of materials e.g., test banks	2.49	6
Environmental concerns (conserve paper, trees, landfill)	2.43	7
Support from administration	2.34	8
Recognition for efforts toward innovation	2.01	9
Impact on bookstore	1.47	10

N=2707

Section 4: Perceptions and Attitudes about Development of Open Access Materials

Likelihood of Developing Open Access Materials

Table 11 presents a ranking by respondents regarding their opinion about the likelihood of developing open access materials. These rankings are quite a bit lower than the likelihood of using open access materials (See Table 11).

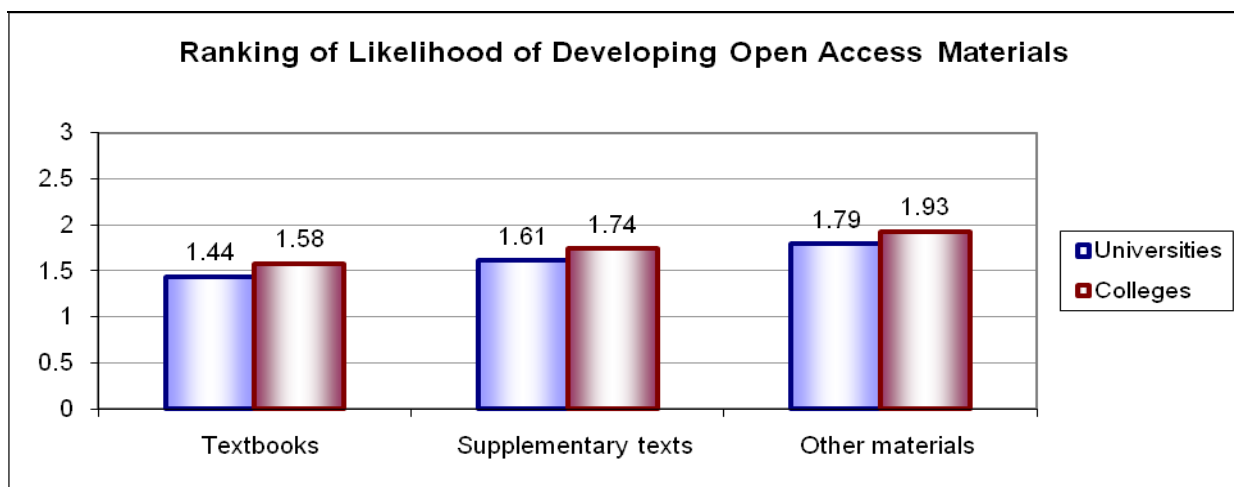
- University respondents ranked the likelihood of developing open access materials somewhat lower than did state/community college respondents.
- Administrator respondents (from both colleges and universities) ranked the likelihood of developing open access materials in a pattern similar to that of the university respondents.
- Although the likelihood of developing any type of open access materials was ranked low, respondents were slightly more likely to develop “other” types of materials. This result may be related to faculty concerns about time, because other types of materials such as test questions or perhaps a podcast is less labor intensive.

Table 11. Likelihood of Developing Open Access Materials

Ranking of Likelihood of DEVELOPING (1= Not at all likely; 3= very likely)	All Institutions	Universities	Colleges
Textbooks	1.5	1.44	1.58
Supplementary texts	1.66	1.61	1.74
Other materials	1.85	1.79	1.93

N=2707

Figure 11. Ranking of Likelihood of Respondents Developing Open Access Materials.



N=2707

Factors Influencing the Decision to Create Open Access Materials

Table 12 presents a ranking by respondents regarding their opinion about the likelihood of creating open access materials.

- All respondents ranked “time to develop” as the most important factor when considering whether to create open access materials.
- University faculty ranked peer-review and editing, and recognition for innovation and promotion slightly higher than did their college counterparts.
- Concerns about tenure were ranked equally low by both sets of faculty respondents, as factors influencing their decision to create open materials. That may be because, for most institutions, open materials are not considered during the tenure process.

Table 12. Factors Influencing the Decision to Create Open Access Materials

Rank of Factors influencing decision to CREATE: (1= Not at all imp.;3=Very imp.)	All Institutions	Universities		Colleges	
	Average	Average	Rank	Average	Rank
Time to develop OA materials	2.8	2.78	1	2.83	1
Hardware, software to facilitate use	2.53	2.44	2	2.64	3
Desire to reduce costs to students	2.52	2.39	4	2.69	2
Assurance material would be peer-reviewed and edited	2.44	2.41	3	2.46	4.5
Availability of review criteria to authors	2.39	2.34	5	2.45	6
Support from administration	2.39	2.33	6	2.46	4.5
Environmental concerns (conserve paper, trees, landfill)	2.28	2.2	9	2.4	8
Availability of supplementary materials	2.25	2.12	11	2.41	7
Availability of other authors to co-develop	2.22	2.19	10	2.26	9
Recognition for efforts toward innovation	2.2	2.24	7	2.15	10
Recognition for efforts toward promotion	2.11	2.21	8	2	11
Recognition for efforts toward tenure	1.97	2.03	12	1.88	12
Impact on campus bookstore	1.37	1.32	13	1.44	13

N=2707

Tables 12a and 12b present an ordered list from highest to lowest rank by each type of institution (university and colleges, respectively).

Table 12a. Ordered Ranking of Factors Influencing Respondents' Decision to Create Open Access Materials – Universities

Rank of Factors influencing Decision to CREATE: (1= Not at all important;3=Very important)	Universities	
	Average	Rank
Time to develop OA materials	2.78	1
Hardware, software to facilitate use	2.44	2
Assurance material would be peer-reviewed and edited	2.41	3
Desire to reduce costs to students	2.39	4
Availability of review criteria to authors	2.34	5
Support from administration	2.33	6
Recognition for efforts toward innovation	2.24	7
Recognition for efforts toward promotion	2.21	8
Environmental concerns (conserve paper, trees, landfill)	2.2	9
Availability of other authors to co-develop	2.19	10
Availability of supplementary materials	2.12	11
Recognition for efforts toward tenure	2.03	12
Impact on campus bookstore	1.32	13

N=2707

Table 12b. Ordered Ranking of Factors Influencing Respondents' Decision to Create Open Access Materials – Colleges

Rank of Factors influencing Decision to CREATE: (1= Not at all important; 3=Very important)	Colleges	
	Average	Rank
Time to develop OA materials	2.83	1
Desire to reduce costs to students	2.69	2
Hardware, software to facilitate use	2.64	3
Assurance material would be peer-reviewed and edited	2.46	4.5
Support from administration	2.46	4.5
Availability of review criteria to authors	2.45	6
Availability of supplementary materials	2.41	7
Environmental concerns (conserve paper, trees, landfill)	2.4	8
Availability of other authors to co-develop	2.26	9
Recognition for efforts toward innovation	2.15	10
Recognition for efforts toward promotion	2	11
Recognition for efforts toward tenure	1.88	12
Impact on campus bookstore	1.44	13

N=2707

Section 5: Materials Considered/Used by Institutions for Determining Promotion and Tenure

Since many faculty are affected by evaluations of their scholarly work, the types of publications they produce also affect their promotion and tenure. The survey inquired about the types of materials considered for these promotion and tenure decisions at the respective institutions. Table 13 presents the proportion of the types of open access materials that respondents reported were used at their institution in considering faculty performance for promotion and tenure. Figure 13 offers a visual comparison of which types of open access items are more frequently used in considering promotion and tenure.

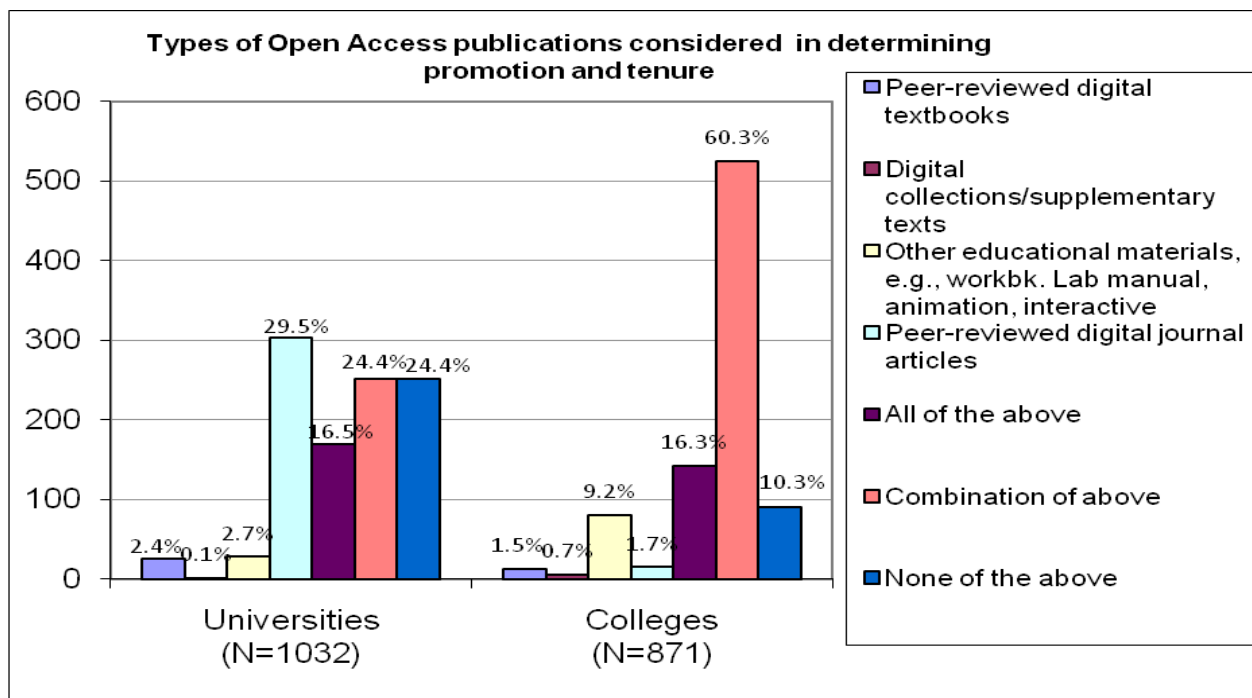
- Sixty-nine percent (n=1887) of all respondents answered this question—the relative importance of the types of publications indicate that, of that group, 40.9% reported that no open access materials were used/considered in determining promotion or tenure.
- Of all respondents who indicated that some types of open access materials were used in considering promotion and tenure, the highest proportion (17.1%) indicated that peer reviewed digital journal articles were considered.
- University respondents indicated the highest proportion of open access publications considered (29.5%) in promotion and tenure decisions were peer reviewed digital journal articles.
- The next highest percentage of items considered for tenure and promotion for both universities (24.4%) and colleges (60.3%) was a combination of the open access material types.

A possible explanation for the failure to consider open access materials as part of the promotion and tenure process may be that some of these digital materials are relatively recent to education. Of all the digital materials, digital peer-reviewed journals are most similar to the established print journals that have long been part of the promotion and tenure process.

Table 13. Open Access Materials Used/Considered by Institution for Promotion and Tenure

Creation of the following publications that institution considers as partial satisfaction of scholarly production criteria for promotion and tenure	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
Peer-reviewed digital textbooks	35	1.9%	25	2.4%	13	1.5%
Digital collections/supplementary texts	7	0.4%	1	0.1%	6	0.7%
Other educational materials, e.g., workbook, lab manual, animation, interactive	107	5.7%	28	2.7%	80	9.2%
Peer-reviewed digital journal articles	323	17.1%	304	29.5%	15	1.7%
All of the above	308	16.3%	170	16.5%	142	16.3%
Combination of above	336	17.7%	252	24.4%	525	60.3%
None of the above	771	40.9%	252	24.4%	90	10.3%
TOTAL	1887	100.0%	1032	100.0%	871	100.0%

Figure 13. Types of Materials Used/Considered by Institution for Promotion and Tenure



Section 6: Report of Types of Materials Developed/Developing for Open Access

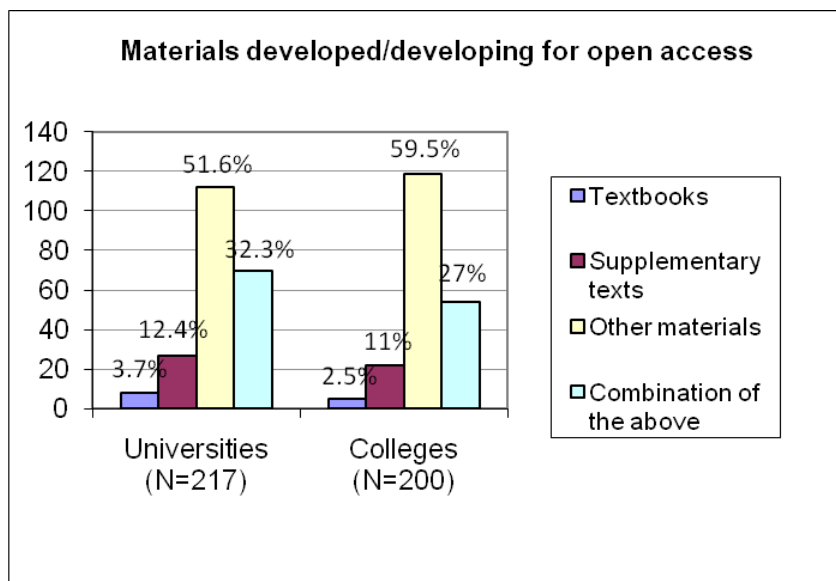
Respondents were asked whether or not they had developed or were developing materials for open access. (See Table 14 and Figure 14.)

- The greatest proportion of materials that had or were being developed were 'Other materials,' with 54.7% of all respondents reporting this activity.
- A slightly higher proportion of college respondents (59.5%) had developed or were developing other open access materials, as compared to university respondents (51.6%).

Table 13. Materials Developed/Developing by Respondents for Open Access

Materials developed/developing for open access	All Institutions		Universities		Colleges	
	N	%	N	%	N	%
Textbooks	15	3.6%	8	3.7%	5	2.5%
Supplementary texts	49	11.9%	27	12.4%	22	11%
Other materials	226	54.7%	112	51.6%	119	59.5%
Combination of the above	123	29.8%	70	32.3%	54	27%
TOTAL	413	100%	217	100.0%	200	100%

Figure 14. Materials Developed/Developing by Respondents for Open Access



Section 7: Interest in and Preferred Setting for Activities Related to Open Access Materials

Survey respondents were asked about which activities or information they were most interested in, related to open access materials. They were also asked to choose the method of participation they preferred for each topic or activity.

- Respondents were most interested in receiving more information about open access in general.
- The next highest ranked topic was “guidelines to find and select OA materials.”

For both colleges and university respondents, the preferred setting for receiving information about open access materials, and for activities related to the use and development of open access materials was through face-to-face meetings (F2F). (See Tables 15a and 15b). Figure 15a shows the preferred settings for receiving information.

- The interest and preference for F2F meetings was greater among university respondents than state and community college respondents.
- The second most preferred method of communication preferred was a combination of online and/or e-mail communications. For most information items, the state and community colleges registered slightly higher preferences for online communication than did universities.

Table 15a. Interest in and Preferred Setting for Open Access Activities – Universities

Universities						
Activities of Interest	N	F2F	Online	E-mail	All the above	Combinations
Open Access information in general	986	45.1%	14.8%	19.8%	7.1%	13.2%
Guidelines to find and select OA materials	922	48.3%	19.5%	16.8%	3.8%	11.6%
Guidelines for authoring OA textbooks	794	43.8%	20.3%	20.2%	5.3%	10.4%
Peer-reviews of OA texts: guidelines, stipends, process	827	48.4%	21.4%	16.7%	3.0%	10.5%
Copyright and Intellectual property related to OA	866	46.7%	21.7%	18.5%	4.7%	8.4%
Royalties for textbook authors	824	52.8%	20.0%	15.9%	2.9%	8.4%
Work with team to develop OA materials	771	39.0%	19.5%	26.2%	4.4%	10.9%
Promoting recognition of OA efforts	741	49.4%	19.8%	18.9%	3.1%	8.8%

Figure 15a. Preferred setting/method for information about Open Access Materials Universities

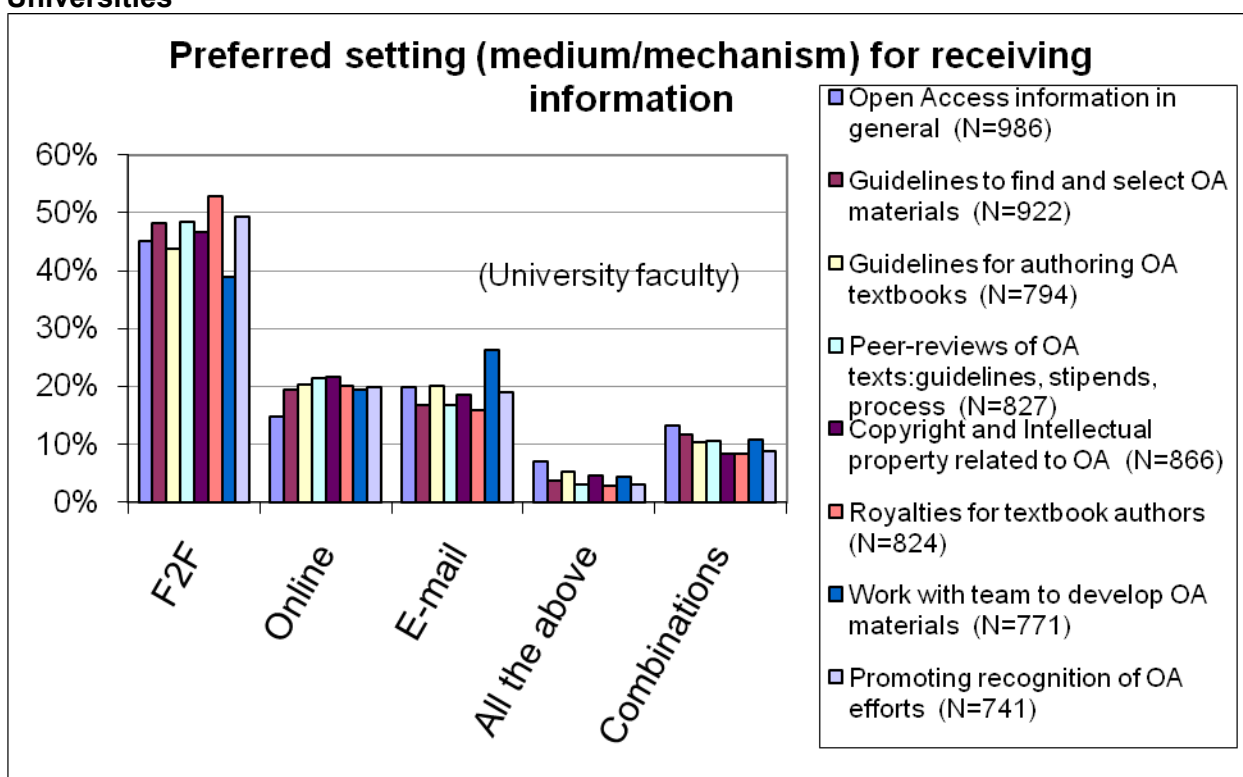
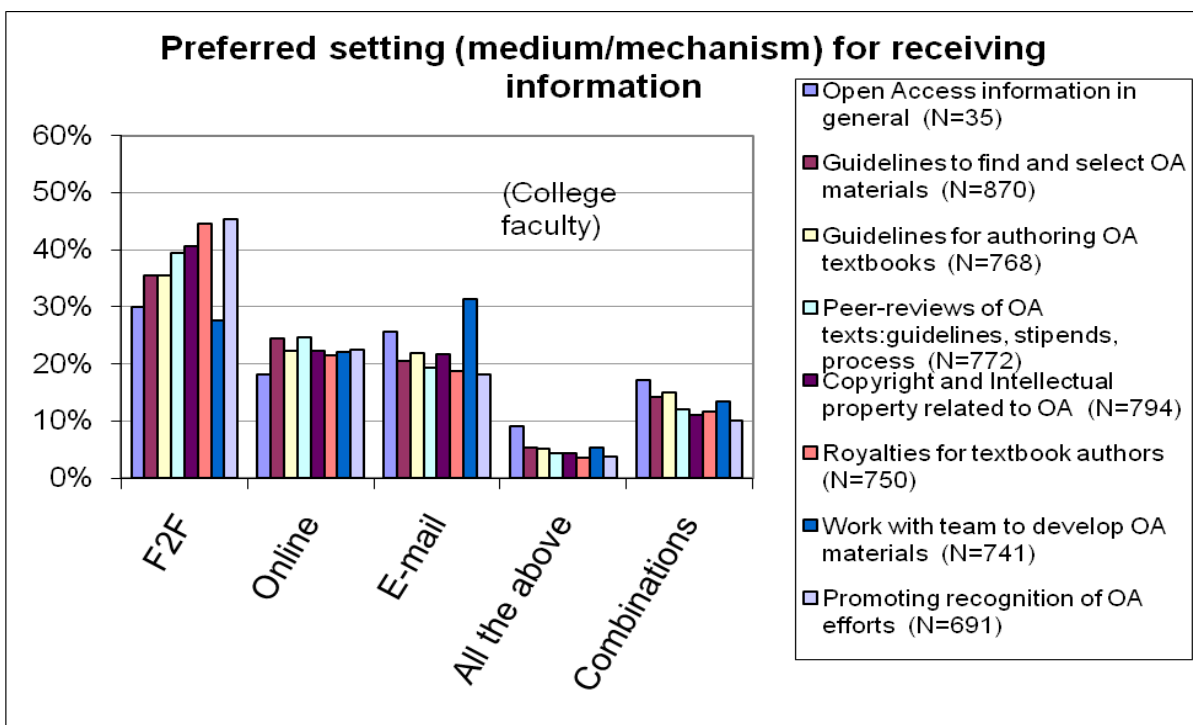


Table 15b. Interest in and Preferred Setting for Open Access Activities – Colleges

Colleges						
Activities of Interest	N	F2F	Online	E-mail	All the above	Combinations
Open Access information in general	899	30%	18.10%	25.60%	9.20%	17.10%
Guidelines to find and select OA materials	870	35.50%	24.40%	20.50%	5.30%	14.30%
Guidelines for authoring OA textbooks	768	35.50%	22.30%	22%	5.20%	15%
Peer-reviews of OA texts: guidelines, stipends, process	772	39.50%	24.60%	19.40%	4.40%	12.10%
Copyright and Intellectual property related to OA	794	40.60%	22.30%	21.70%	4.30%	11.10%
Royalties for textbook authors	750	44.50%	21.50%	18.80%	3.60%	11.60%
Work with team to develop OA materials	741	27.70%	22.10%	31.40%	5.40%	13.40%
Promoting recognition of OA efforts	691	45.30%	22.60%	18.20%	3.80%	10.10%

Figure 15b. Preferred setting/method for information about Open Access Materials – Colleges



B-2 Survey Results for Faculty and Administrator Users of Open Access Materials

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Purpose

The previous section, Appendix B-1, presents discussion and data describing the results of an online survey conducted in October 2009 of faculty and administrators in the universities and state and community colleges. For specific details and methodology, see Appendix B-1.

This section presents information from the same data set that is specific to those who indicated that they had actually used open access materials in their classes (n=322). Because of their previous experience with open access materials, this smaller set of respondents was asked a separate set of questions to provide insight into specific benefits or difficulties that may be presented in using these materials, and additional questions comparing quality, value and cost reduction for the open access materials as compared to traditional materials.

Results

This analysis describes the responses of a total of 322 faculty and administrators who indicated that they had used online open access materials for their classes. This number constitutes 12.1% of the total number of respondents. (A total of 2707 faculty and administrators responded to the online survey.) Given the smaller size of this subsample, some of the tables that are included in Appendix B-2 will have smaller numbers overall and percentages will be based only on their responses.

The tables and charts display results in percentages, as well as average ratings or rankings for answers about certain topics, according to university or college category.

- Section 1 presents information on the characteristics of the respondents in the sample, their institutions and levels taught.
- Section 2 discusses faculty and administrators' perceptions and attitudes about open access materials.

Section 1: Characteristics

Open Access Users by Type of Institution

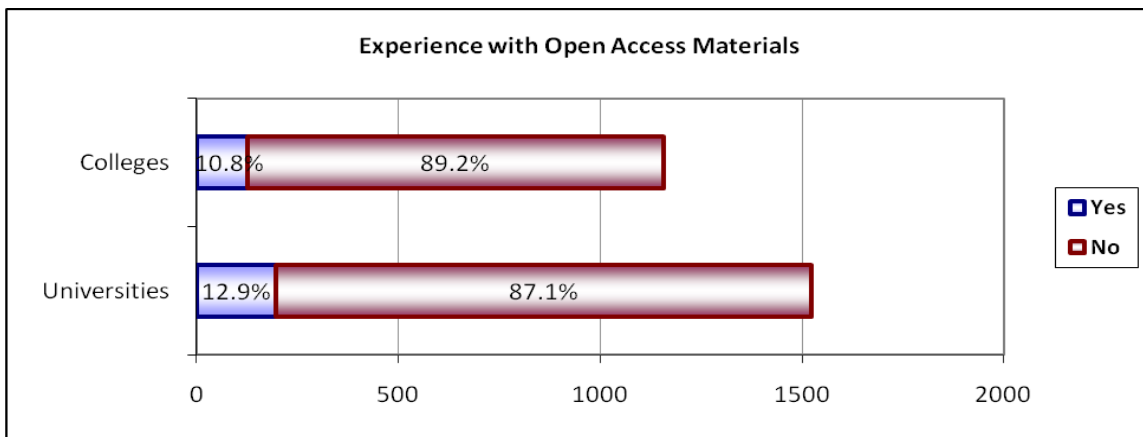
As indicated above, 322 educators/administrators reported that they had used open access (open access) materials. Looking at all survey respondents, the proportion of university faculty indicating they had used OA materials was 12.1%, and a slightly lower percentage (10.8%) of community college users said they had used OA materials. Table 16 and Figure 16 present the distribution of respondents by type of institutional affiliation, across all respondents.

- A greater proportion of the previous users of open access materials were from universities (51.9%) as compared to state and community colleges (44.7%).

Table 16. Experience with Open Access Materials.

Used Open Access Materials	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
Yes	322	12.1%	197	12.9%	125	10.8%
No	2350	87.9%	1326	87.1%	1033	89.2%
Total	2672	100%	1523	100%	1158	100%

Figure 16. Experience with Open Access Materials.



N=2672

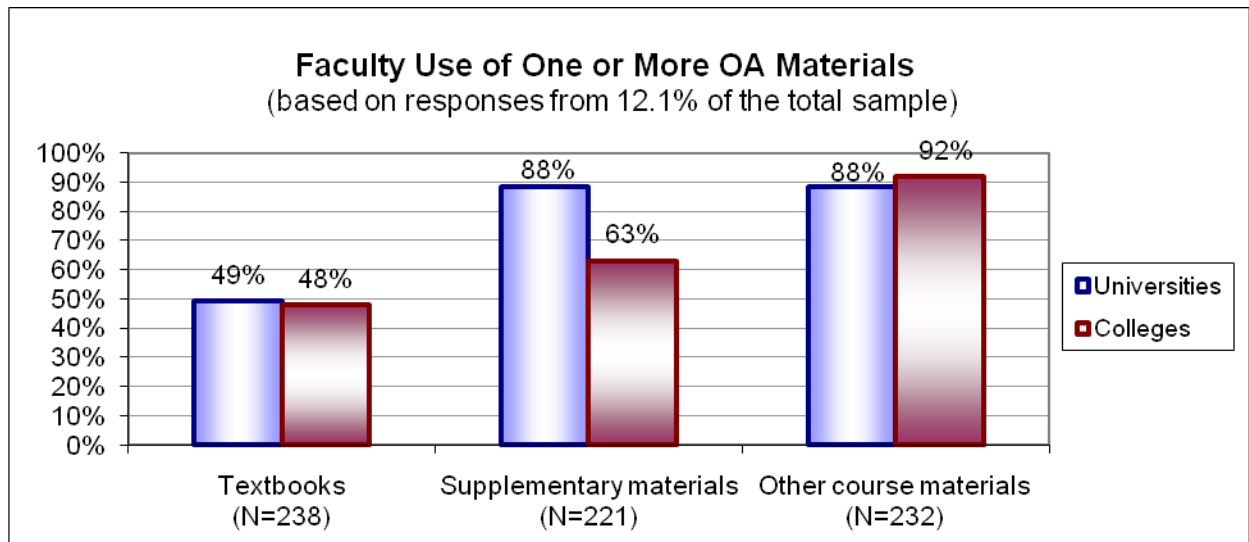
The next tables and figures (Table 17 and Figure 17) describe the types of open access materials that faculty and administrators reported they had used, according to type of institution. Table 17 and Figure 17 summarizes the use of “one or more” materials by type of open access material and institution. These results show that:

- The greater proportion of one or more open access materials used were the “other” materials (88%, universities and 92%, colleges).
- Use of one or more “supplementary materials” was higher among university faculty/administrators (88%), while 63% of college faculty and administrators reported they used one or more.

Table 17. Faculty Who Used One or More Open Access Materials by Type of Institution

One or More Open Access Materials Used	N (combined responses)	% of Respondents from Universities	% of Respondents from Colleges
Textbooks	238	49%	48%
Supplementary materials	211	88%	63%
Other course materials	232	88%	92%

Figure 17. Faculty Who Used One or More Open Access Materials by Type of Institution



Tables 18, 19 and 20 provide a more detailed breakdown of the distribution of faculty/administrator use of open access textbooks, supplementary open access materials and other open access materials.

Table 18. Faculty Who Have Used Open Access “Textbooks” by Type of Institution

Proportion of faculty who have used Textbooks	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
None	120	50.4%	75	50.7%	48	52.2%
One or more	118	49.6%	73	49.3%	44	47.8%
Total	238	100%	148	100%	92	100%

Table 19. Faculty Who Have Used Open Access “Supplementary” Materials by Type of Institution

Proportion of faculty who have used Supplementary materials	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
None	78	35.3%	17	11.7%	30	37.0%
One or more	113	64.7%	124	88.3%	51	63.0%
Total	221	100%	141	100%	81	100%

Table 20. Faculty Who Have Used “Other” Open Access Materials by Type of Institution

Proportion of faculty who have used Other course materials	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
None	25	10.8%	17	11.7%	8	9.1%
One or more	207	89.2%	128	88.3%	80	91.9%
Total	232	100%	145	100%	88	100%

Section 2: Comparison of Perceptions of Open Access Materials

The analysis of the subsample of respondent users provides an opportunity to learn more about the perceptions of those who had actually used open access materials. The survey asked actual users of open access materials to compare the relative value, cost, ease of use. The following tables and figures show the rankings of users’ comparisons of regular educational materials to open access materials.

The data indicate that when comparing open access materials to regular materials:

- The lowest ranked open access materials were open access “textbooks” (1.71, 1.77 average rank)
- Faculty and administrators ranked “other” open access materials highest (2.0, and 2.1 average rank)
- “Supplementary” open access materials were ranked second highest (1.92, 1.94 average rank)
- When administrators ranked the comparable value, cost and ease of use of open access materials as compared to regular educational materials, the results are similar to those of the general population of respondents, although administrator rankings were higher for open access supplementary materials and textbooks.

Table 21. Comparison of Open Access Materials (Average Rank)

Comparison of open access materials	All Institutions (N=322)	Universities (N=197)	Colleges (N=125)
	Rank	Rank	Rank
Textbooks (Average rank)	1.75	1.71	1.77
Value? (1=less; 3=more)	1.76	1.76	1.74
Reduce cost? (1= little; 3=greater)	2.24	2.28	2.12
Ease of use? (1=easier; 3=harder)	2.09	2.06	2.25
Likely to use (1=less; 3=more)	1.86	2.09	2.09
Supplementary texts (Average rank)	1.94	1.92	1.94
Value? (1=less; 3=more)	2.07	2.05	2.04
Reduce cost? (1= little; 3=greater)	2.22	2.21	2.27
Ease of use? (1=easier; 3=harder)	1.93	1.94	2
Likely to use (1=less; 3=more)	2.12	2.12	2.25
Other materials (Average rank)	2.07	2.04	2.1
Value? (1=less; 3=more)	2.15	2.13	2.14
Reduce cost? (1= little; 3=greater)	2.13	2.18	2.07
Ease of use? (1=easier; 3=harder)	1.89	1.89	1.95
Likely to use (1=less; 3=more)	2.23	2.23	2.31

Figure 21. Comparisons of Open Access Materials by Institutional Type

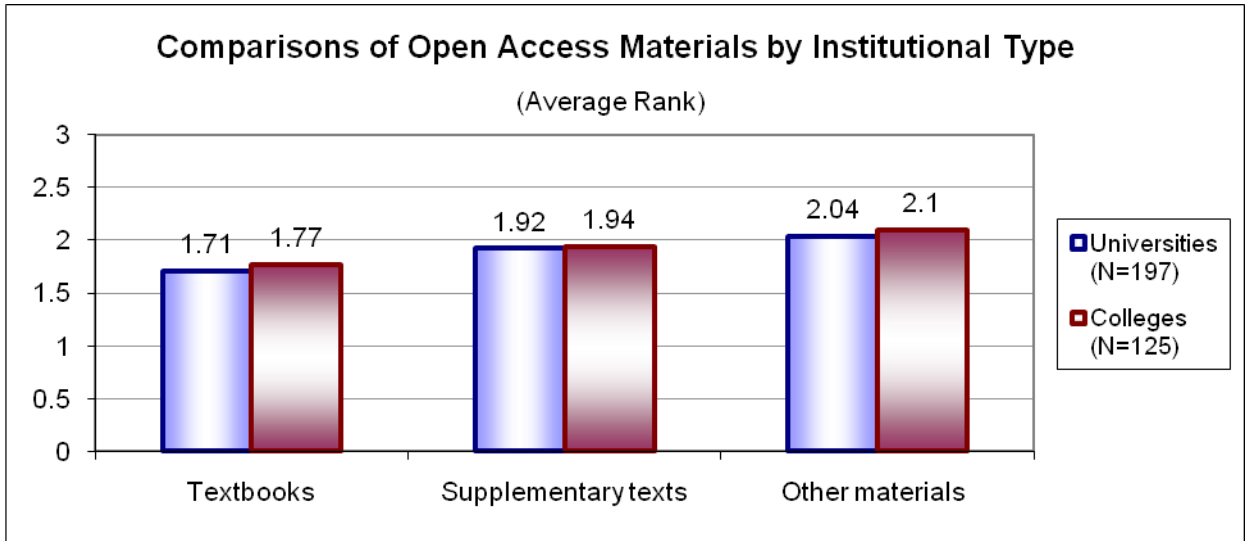


Figure 22a. Comparisons of Open Access Textbooks by Institutional Type

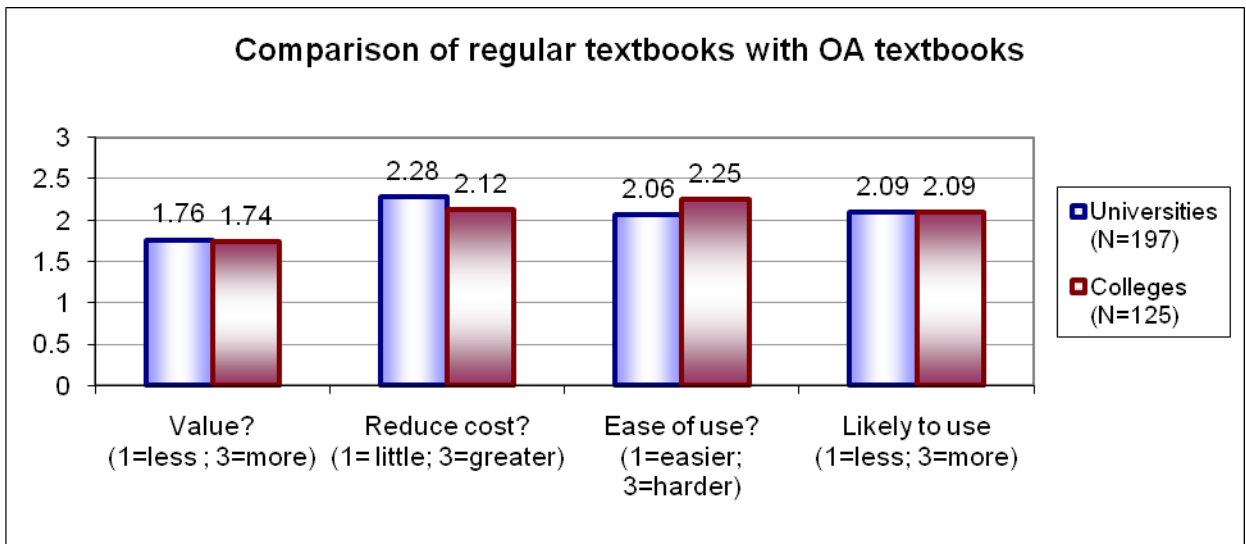


Figure 22b. Comparisons of Open Access Supplementary Materials by Institutional Type

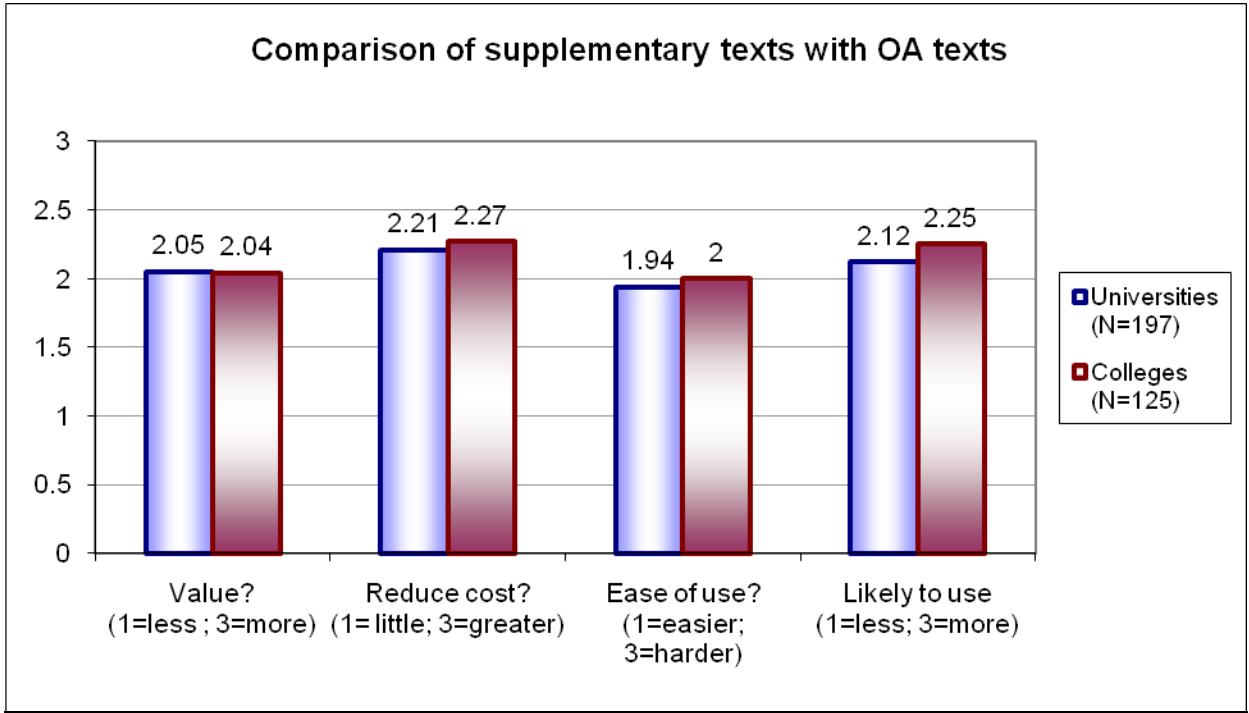
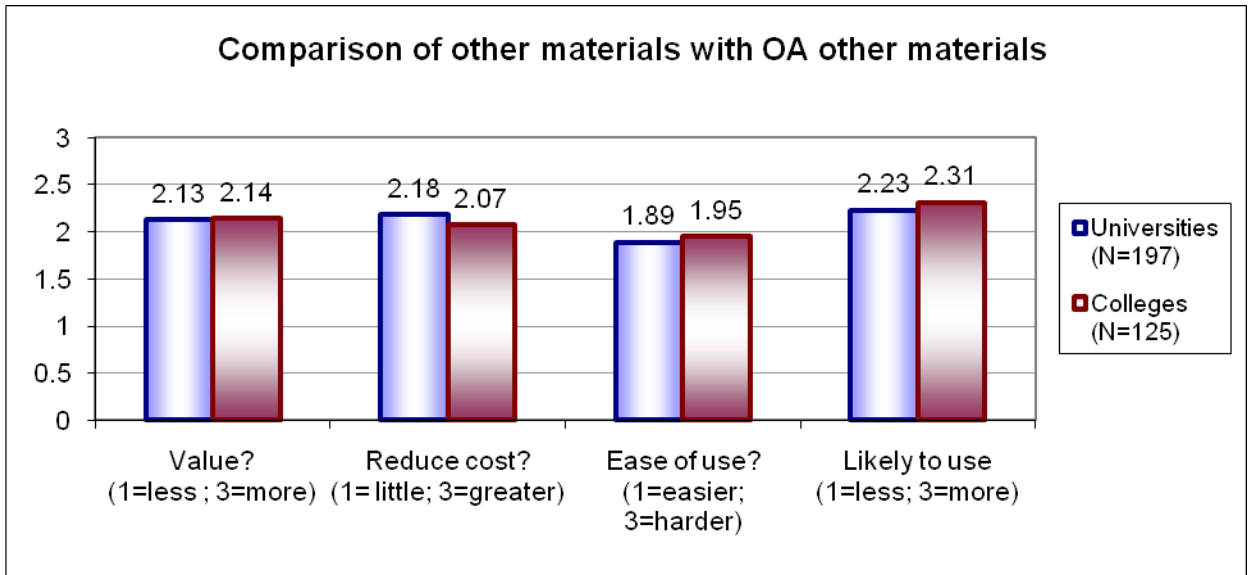


Figure 22c. Comparisons of Other Open Access Supplementary Materials by Institutional Type



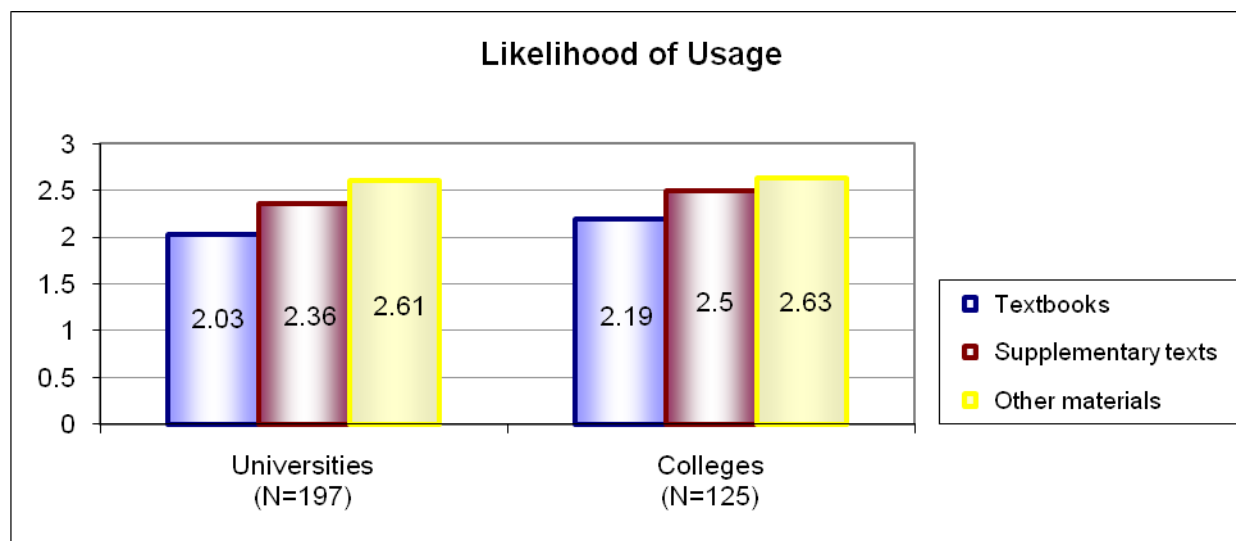
Likelihood of Use of Open Access Materials by Current and Former Open Access Users

Respondents who had used or were using open access materials were also asked about the likelihood of using them (again) for their courses. Table 23 offers the ranked likelihood of using the materials.

Table 23. Likelihood of Using Open Access Materials by Type of Institution (average rank)

Ranking of Likelihood of USING OA Materials (1= Not at all likely; 3= very likely)	All Institutions (N=322)	Universities (N=197)	Colleges (N=125)
Textbooks	2.1	2.03	2.19
Supplementary texts	2.42	2.36	2.5
Other materials	2.63	2.61	2.63

Figure 23. Likelihood of Using Open Access Materials by Type of Institution (average rank)



As the above table distributions and figures indicate, the relative ranking of the types of open access materials that faculty said they were likely to use is:

- The least likely open access materials to be used for their courses is open access “textbooks” although the extent of the differences is not great.
- The highest ranked materials that is likely to be used for their courses are “other” open access materials.

Factors Influencing Decision to Use Open Access Materials

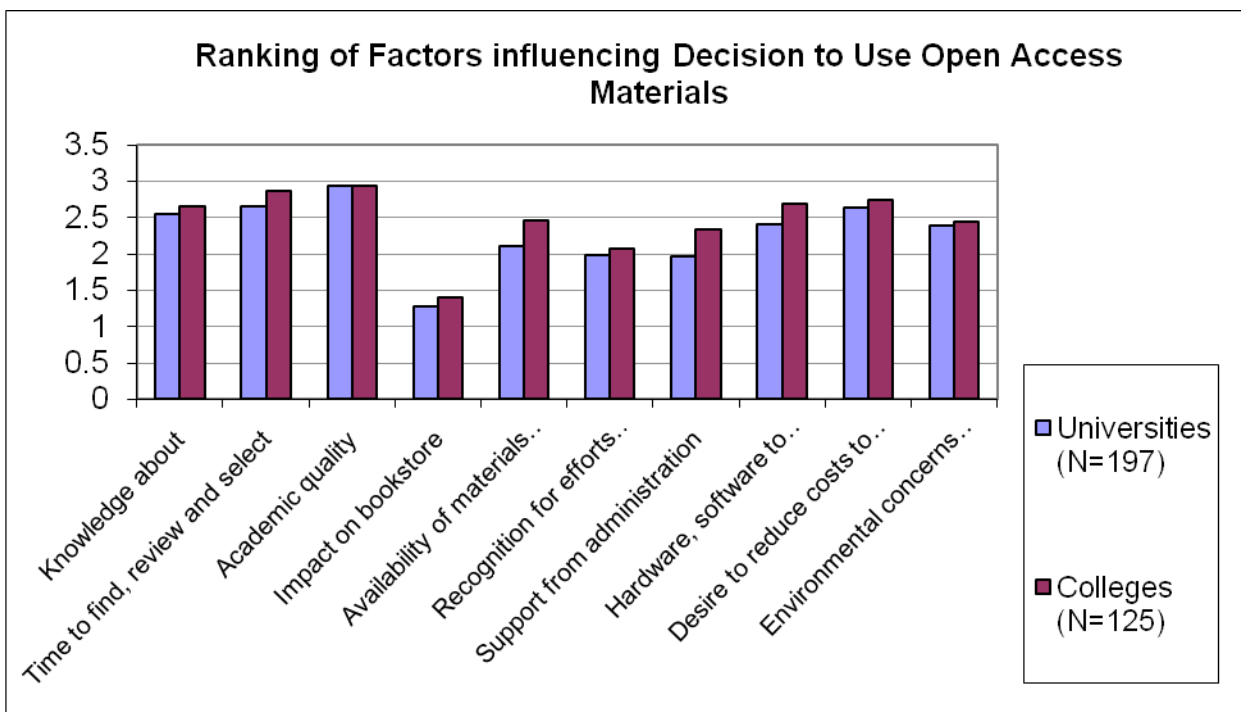
Given the above average rankings of likelihood to use different types of open access materials, the respondents were then asked to rank which factors might more highly affect their decision to use open access materials. Table 24 and Figure 24 present the results.

- The most highly ranked factor was academic quality (2.94 for universities and colleges).
- The next two factors—time to find, review and select; and desire to reduce costs to students) were also ranked similarly by college and university respondents, respectively (2.86, 2.66 and 2.75, 2.64 average rank).
- The second- and third-ranked factors were lower ranked by university respondents compared to the rankings of college respondents.
- The pattern of rankings of factors affecting decisions to use the materials for administrators was comparable to the patterns of general survey respondents.

Table 24. Factors Influencing Decision to Use of Open Access Materials

Rank of Factors influencing Decision to USE: (1= Not at all important.; 2 = Somewhat important; 3=Very important.)	All Institutions (N=322)	Universities (N=197)		Colleges (N=125)	
	Average	Average	Rank	Average	Rank
Academic quality	2.94	2.94	1	2.94	1
Time to find, review and select	2.74	2.66	2	2.86	2
Desire to reduce costs to students	2.69	2.64	3	2.75	3
Knowledge about	2.59	2.54	4	2.65	5
Hardware, software to facilitate use	2.52	2.41	5	2.68	4
Environmental concerns (conserve paper, trees, landfill)	2.4	2.38	6	2.44	7
Availability of materials e.g.,test banks	2.25	2.11	7	2.46	6
Support from administration	2.1	1.97	9	2.33	8
Recognition for efforts toward innovation	2	1.98	8	2.07	9
Impact on bookstore	1.31	1.27	10	1.4	10

Figure 24. Factors Influencing Decision to Use of Open Access Materials



Likelihood of Developing or Creating Open Access Materials

The next set of questions to users of open access materials dealt with what they thought was the likelihood of developing or creating open access materials. Table 25 and Figure 25 provide the average rank of that likelihood of developing them by type of educational institution. As with the other measures, faculty respondents were more likely to develop other open access materials before developing open access supplementary or textbook materials. Table 26 and Figure 26 present some of the factors that respondents thought would influence their decision to create such materials.

Table 25. Ranking of Likelihood of Developing Open Access Materials

Ranking of Likelihood of Developing OA Materials (1= Not at all important.; 2 = Somewhat important; 3=Very important.)	All Institutions (N=322)	Universities (N=197)	Colleges (N=125)
Textbooks	1.69	1.64	1.76
Supplementary texts	1.94	1.88	2.07
Other materials	2.26	2.15	2.47

Figure 25. Ranking of Likelihood of Developing Open Access Materials

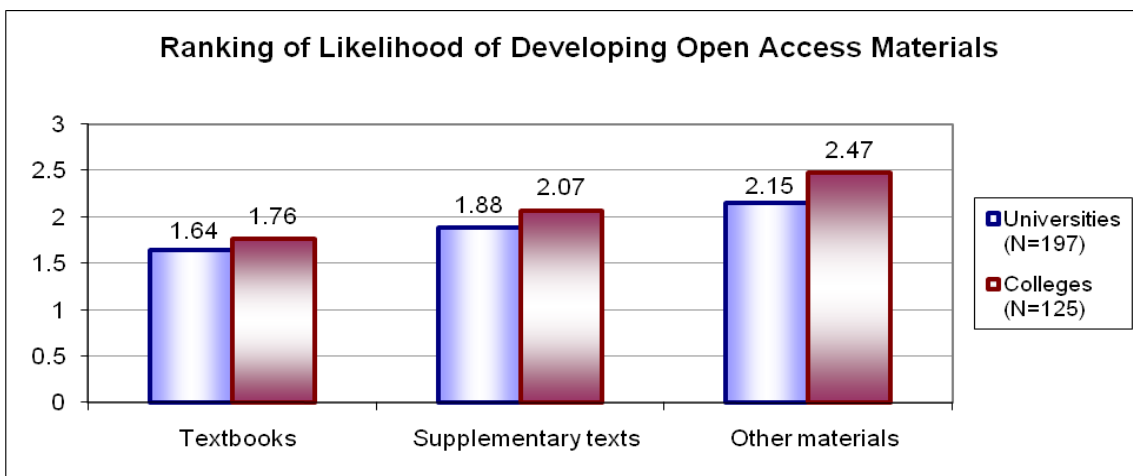
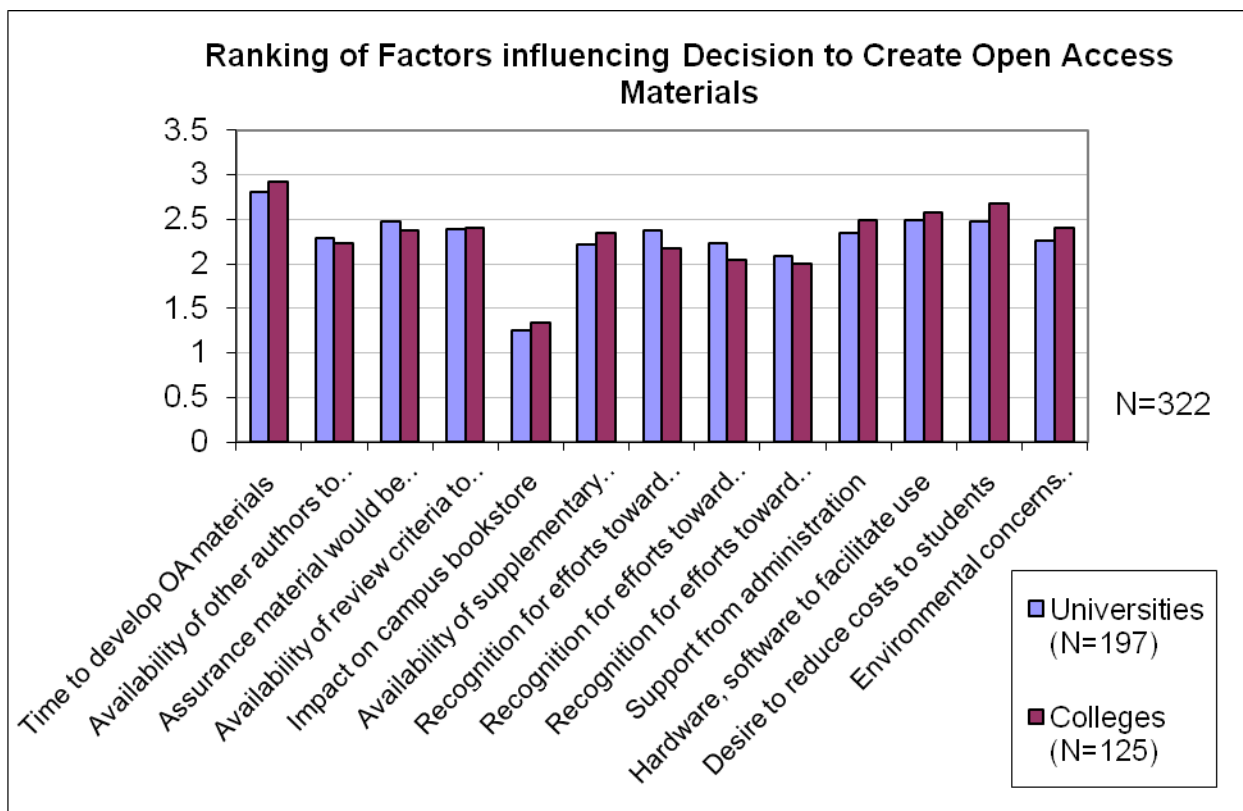


Table 26. Factors Influencing Decision to CREATE Open Access Materials

Figure 26. Factors Influencing Decision to CREATE Open Access Materials –

Rank of Factors influencing decision to CREATE: (1= Not at all important; 2 = Somewhat important; 3=Very important)	All Institutions (N=322)	Universities (N=197)		Colleges (N=125)	
	Average	Average	Rank	Average	Rank
Time to develop OA materials	2.85	2.80	1	2.92	1
Desire to reduce costs to students	2.55	2.48	3	2.68	2
Hardware, software to facilitate use	2.52	2.49	2	2.57	3
Assurance material would be peer-reviewed and edited	2.45	2.47	4	2.38	7
Availability of review criteria to authors	2.41	2.39	5	2.40	6
Support from administration	2.41	2.35	7	2.49	4
Environmental concerns (conserve paper, trees, landfill)	2.32	2.26	9	2.41	5
Availability of other authors to co-develop	2.29	2.29	8	2.23	9
Recognition for efforts toward innovation	2.29	2.37	6	2.17	10
Availability of supplementary materials	2.27	2.22	11	2.34	8
Recognition for efforts toward promotion	2.16	2.23	10	2.04	11
Recognition for efforts toward tenure	2.06	2.08	12	2.00	12
Impact on campus bookstore	1.29	1.26	13	1.34	13

Comparison by Type of Institution



(1= Not at all important; 2 = Somewhat important; 3 = Very important)

Tables 27 and 28 provide an order ranking of the different factors that university and state or community college users of open access materials felt would influence their decision to create open access materials.

- The users of open access materials ranked most of the items slightly higher than did the general sample of respondents.
- The relative order of ranking of items is similar between state or community colleges and universities, except for “assurance material would be peer reviewed” which was ranked higher by university users.
- Administrators ranked the likelihood of developing and creating open access materials in patterns similar to that of the universities and colleges, but their overall rankings are lower. There were no statistically significant differences between administrators and other respondents.
- All respondents ranked “time to develop” as the most important factor when considering whether to create open access materials.

Table 27. Ordered Ranks of Factors Influencing Decision to CREATE Open Access Materials – Colleges

Rank of Factors influencing decision to CREATE: (1= Not at all important; 2 = Somewhat important; 3=Very important)	Universities (N=197)	
	Average	Rank
Time to develop OA materials	2.80	1
Hardware, software to facilitate use	2.49	2
Desire to reduce costs to students	2.48	3
Assurance material would be peer-reviewed and edited	2.47	4
Availability of review criteria to authors	2.39	5
Recognition for efforts toward innovation	2.37	6
Support from administration	2.35	7
Availability of other authors to co-develop	2.29	8
Environmental concerns (conserve paper, trees, landfill)	2.26	9
Recognition for efforts toward promotion	2.23	10
Availability of supplementary materials	2.22	11
Recognition for efforts toward tenure	2.08	12
Impact on campus bookstore	1.26	13

Table 28. Ordered Ranks of Factors Influencing Decision to CREATE Open Access Materials – Universities

Rank of Factors influencing decision to CREATE: (1= Not at all important.; 2 = Somewhat important; 3=Very important.)	Colleges (N=125)	
	Average	Rank
Time to develop OA materials	2.92	1
Desire to reduce costs to students	2.68	2
Hardware, software to facilitate use	2.57	3
Support from administration	2.49	4
Environmental concerns (conserve paper, trees, landfill)	2.41	5
Availability of review criteria to authors	2.40	6
Assurance material would be peer-reviewed and edited	2.38	7
Availability of supplementary materials	2.34	8
Availability of other authors to co-develop	2.23	9
Recognition for efforts toward innovation	2.17	10
Recognition for efforts toward promotion	2.04	11
Recognition for efforts toward tenure	2.00	12
Impact on campus bookstore	1.34	13

Differences Among Institutions in Using Open Access Materials in Consideration for Promotion and Tenure

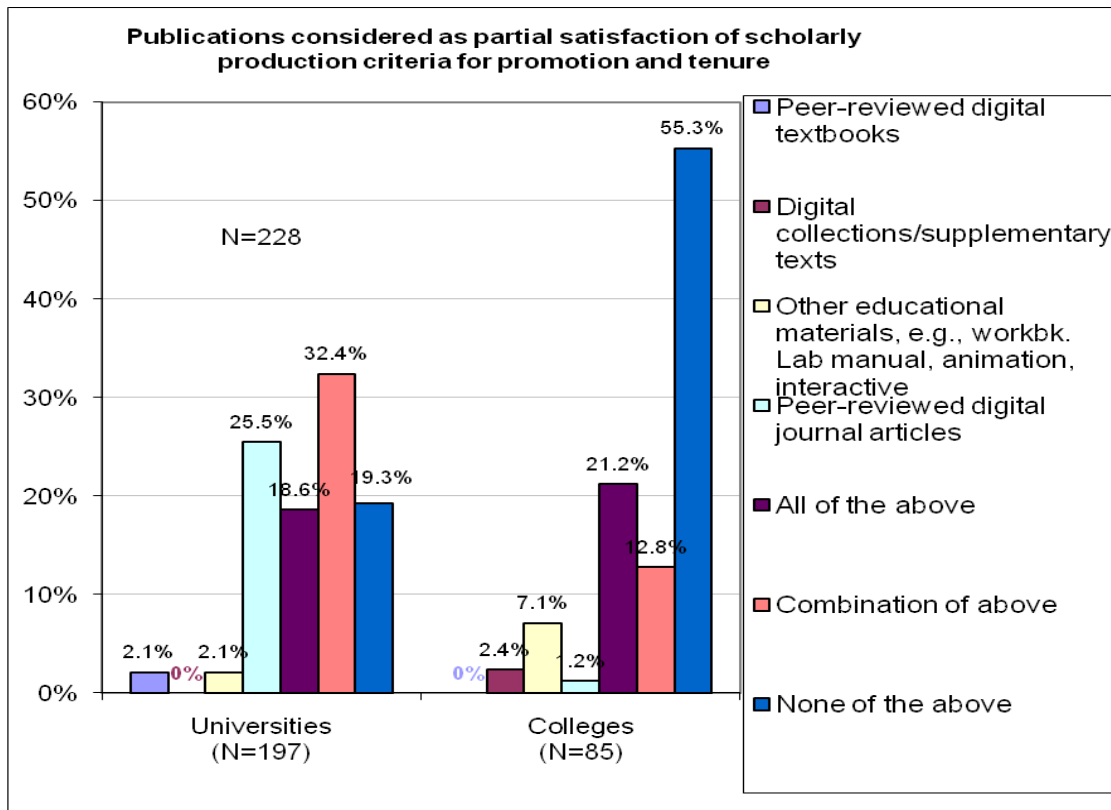
Table 29 provides the number of institutions reportedly using different open access materials as part of the consideration for promotion and tenure.

- A much higher proportion of college and community college respondents (55.3%) indicated that none of the types of publications were considered in determining tenure and promotion than did university respondents (19.3%).
- The more predominately used open-access materials were peer-reviewed digital journals (by universities, 25.5%) and all of the types of materials (by colleges, 21.2%).
- Respondents from universities reported some type of combination of the listed materials were used 25.5%, compared to 12.8% of state and community college respondents.
- Peer-reviewed digital textbooks were the lowest proportion of open access materials reported to be used for determining promotion and tenure.

Table 29. Open Access Materials Used/Considered by Institution in Determining Promotion and Tenure

Creation of the following publications that institution considers as partial satisfaction of scholarly production criteria for promotion and tenure	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
Peer-reviewed digital textbooks	7	1.3%	3	2.1%	0	0%
Digital collections/supplementary texts	2	0.9%	0	0%	2	2.4%
Other educational materials, e.g., workbk. Lab manual, animation, interactive	9	3.9%	3	2.1%	6	7.1%
Peer-reviewed digital journal articles	39	17.1%	37	25.5%	1	1.2%
All of the above	44	19.3%	27	18.6%	18	21.2%
Combination of above	54	25.5%	98	32.4%	74	12.8%
None of the above	73	32.0%	28	19.3%	47	55.3%
TOTAL	228	100.0%	197	100.0%	85	100.0%

Figure 29. Open Access Materials Used/Considered in Determining Promotion and Tenure



Types of Open Access Materials Developed by Open Access Users

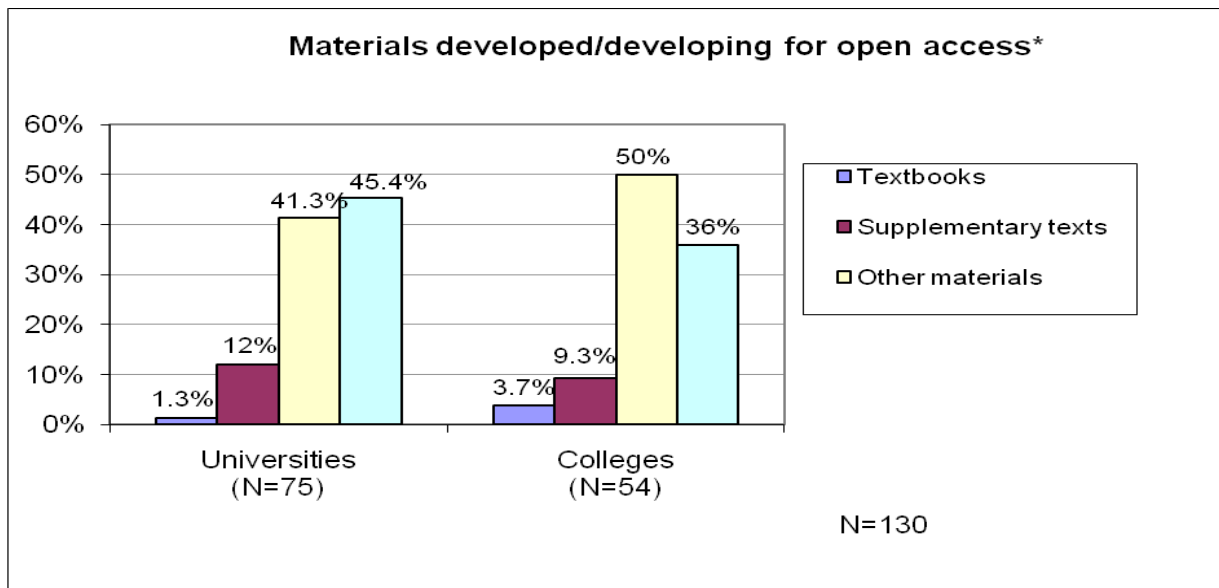
In spite of the fact that some institutions do not use open access materials as part of the criteria for promotion and tenure, several of the user respondents reported that they had developed or were developing open access materials. (See Table 30 and Figure 30)

- The greatest proportion of open access materials developed were other open access materials, followed by supplementary materials.
- Open access textbooks were the least frequently reported materials developed.
- As can be seen in Table 30, state/community college users of open access materials reported development of “textbook” open access materials at a higher rate than did the university respondents.

Table 30. Types of Open Access Materials Users have Developed or are Developing

Materials developed/ developing for open access	All Institutions		Universities		Colleges	
	N	Percent	N	Percent	N	Percent
Textbooks	5	3.8%	1	1.3%	2	3.7%
Supplementary texts	14	10.8%	9	12%	5	9.3%
Other materials	58	44.6%	31	41.3%	27	50%
Combination of the above	63	40.8%	34	45.4%	20	36%
TOTAL	130	100%	75	100%	54	100%

Figure 30. Types of Open Access Materials Users have Developed or are Developing



Appendix C

Open Access Textbook Task Force Online Survey of Florida Faculty and Administrators

Introduction

Thank you for completing this survey, which should take about 15 minutes. Your participation is voluntary, and you may choose to terminate completion of the survey at any time. Your responses will be anonymous and confidential, with results being aggregated for reporting.

Your input will help the Open Access Textbook Task Force respond to the Florida Legislature regarding what our institutions and faculty know and think about the open access textbook initiative in Florida.

When responding to survey questions, please mark the item/box next to the response that most closely represents your answer. Where space is provided for open text responses, we encourage you to be as detailed as you can.

Please note that questions which require an answer are marked with an asterisk (*).

Thank you again for your assistance!

- 1. Please select the name of your educational institution.**
- 2. Please describe your position(s) at your educational institution. Choose all that apply.**
 - Full time faculty member
 - Part-time faculty member
 - Adjunct
 - Administrator (chair, coordinator, dean, provost, vice-president)
 - Other (please specify)
- 3. Please choose the general discipline area(s) in which you teach. Choose all that apply.**
 - Education
 - Humanities and Arts
 - Social Science and Law
 - Foreign Languages
 - Business and Administration
 - Science, Mathematics and Computing
 - Medicine
 - Engineering, Manufacturing and Construction
 - Agriculture, Veterinary Health and Welfare Services
 - Other (please specify)

4. Please describe the level(s) at which you teach. Choose all that apply.

- General Studies courses
- Upper Division courses
- Graduate courses

5. How are textbooks selected for courses that you teach?

- I select the textbooks for my courses in all cases.
- Textbook selection is always a departmental/group decision.
- Only when multiple sections are offered, textbook selection is a group/departmental decision.
- Other (please describe in the open text field below)
- Additional comments or clarification

6. How familiar are you with open access textbooks?

- Not at all familiar
- Somewhat familiar
- Very familiar

7. Have you ever used open access textbooks or open access materials in your courses?

- Yes
- No

[If answer is no, respondents proceed to page 3; if yes, they proceed to page 2]

Page 2 - For previous users of open access textbooks/materials

1. In your previous use of open access textbooks, how many of your textbooks, supplementary texts, or other course materials were open access?

	All of them	1 or 2	3 or 4	5 or more	None of them
Textbooks					
Supplementary texts					
Other course materials					

2. In terms of the quality of the materials, when you compare your regular texts and materials to open access texts/materials, open access texts/materials are:

Textbooks

- Higher quality than regular materials
- Similar in quality to regular materials
- Lower quality than regular materials

Supplementary texts

- Higher quality than regular materials
- Similar in quality to regular materials
- Lower quality than regular materials

Other course materials

- Higher quality than regular materials
- Similar in quality to regular materials
- Lower quality than regular materials

3. In terms of their their value to course activities and student learning, when you compare your regular texts and materials to open access texts/materials, open access texts/materials are:

	More valuable than regular materials	Similar in value to regular materials	Less valuable than regular materials
Textbooks			
Supplementary materials			
Other course materials			
Other (please specify)	[comment field]		

4. Compared to regular course materials, did using open access materials reduce costs for your students?

	Greatly reduced costs for students	Somewhat reduced costs for students	Little or no reduction in costs for students
Textbooks			
Supplementary materials			
Other course materials			
Other (please specify)	[comment field]		

5. Compared to using regular course materials, how easy was it to USE open access materials?

	Much easier to use than regular materials	About the same ease of use as regular materials	More difficult to use than regular materials
Textbooks			
Supplementary materials			
Other course materials			
Other (please specify)	[comment field]		

PAGE 3 – Personal Attitude

1. Considering your own classes, how likely are you to USE open access materials?

	Very likely to use them	Somewhat likely to use them	Not at all likely to use them
Textbooks			
Supplementary materials			
Other course materials			
Other (please specify)	[comment field]		

2. Considering your own classes, how likely are you to DEVELOP open access materials?

	Very likely	Somewhat likely	Not at all likely
Textbooks			
Supplementary materials			
Other course materials			
Other (please specify)	[comment field]		

3. How important are the factors below in influencing your decision to USE open-access textbooks? Please respond to every factor.

	Very important	Somewhat important	Not at all important
Knowledge about open access materials			
Time to find, review, and select open access materials			
Academic quality of materials			
Impact on campus bookstore			
Availability of supplementary materials (e.g., test banks)			
Recognition for efforts toward innovation			
Support from administration			
Hardware, software to facilitate use			
Desire to reduce cost to students			
Environmental concerns (conserving paper, trees and landfill space)			
Other (please specify)			

4. How important are the factors below in influencing your decision to CREATE open-access textbooks? Please respond to every factor.

	Very important	Somewhat important	Not at all important
Knowledge about open access materials			
Time to find, review, and select open access materials			
Academic quality of materials			
Impact on campus bookstore			
Availability of supplementary materials (e.g., test banks)			
Recognition for efforts toward innovation			
Support from administration			
Hardware, software to facilitate use			
Desire to reduce cost to students			
Environmental concerns (conserving paper, trees and landfill space)			
Other (please specify)			

5. Which of the following does your institution consider as partial satisfaction of the scholarly production criteria for promotion and tenure? Select all that apply.

- Creation of of peer-reviewed digital textbooks
- Creation of of digital collections/supplementary texts
- Creation of other educational materials (e.g., workbook, lab manual, animation, interactive activity)
- Creation of peer-reviewed digital journal articles
- None of the above
- Other (please specify)

6. Have you developed, or are you now developing, any materials for open access? Select all that apply.

- Textbook(s)
- Supplementary texts or digital collections
- Other course materials
- None of the above
- If yes, please specify the relevant course name or SCNS number

7. In which of the following would you be interested in participating, to learn more about these topics? Select all that apply.

	Attend face-to-face workshop	Attend online workshop	Receive information via email
Open-access textbooks in general			
Guidelines to find and select open-access materials			
Guidelines for authoring open access textbooks			
Peer reviews of open access texts: guidelines, stipends and process			
Copyright and intellectual property related to open access materials			
Royalties for textbook authors			
Work with team to develop open-access materials			
Promoting recognition of open-access efforts			
Other (please specify)			

8. (Optional) If you would like to be contacted about materials you have created, or are planning to create, please provide your contact information.

- Name:
- Title:
- Email Address:
- Phone Number:

Appendix D

Survey of Student Government Leaders RE: Open Textbooks

Thank you for completing this survey about using Open Access Textbooks, which should take about 10 minutes. Your responses will help us report student perspectives on using open access textbooks in Florida.

In case you are not familiar with how "open access textbooks" differ from other e-texts, here are some characteristics of each.

Open Access Textbooks generally:

- Can be viewed/read for no cost online
- Are permanently available; do not expire
- Can be self-printed with no restrictions
- Can be ordered as bound print copies at costs below traditional texts
- Can be modified/customized by faculty without special permission

Publisher e-texts generally:

- Are viewed/read online for a fee
- Have restrictive licenses that don't allow modification (faculty may work with publishers to negotiate this)
- Are accessible for a limited time period
- May or may not have restrictions on the amount of material students can print out at one time

For more information, please see: <http://www.studentpirgs.org/textbooks>

Your responses are anonymous and confidential and will be incorporated into the Open Access Textbooks Task Force report in the aggregate. The report will be shared with the Florida legislature, governor's office and educational leadership.

You are not required to answer any of the questions, but we encourage you to respond to all of them, if you are able.

Thank you.

Susie Henderson, Chair
Open Access Textbook Task Force

1. Please select your educational institution type.

- University
- Four-year college/ State college
- Community college
- Other (please specify)

2. Have you ever used any of these types of textbooks?

	Yes	No
A purchased online text		
A rented online text		
A free online text		
An online text delivered via e-reader (e.g., Kindle)		
Other (please specify) or your comments		

3. What is your opinion of online texts, as compared to traditional printed textbooks?

	Better than traditional text	About the same as traditional text	Not as good as traditional text	Don't know/Unable to judge
The quality of their content				
Ease of use				
Practice opportunities				
Other (please specify) or your comments				

4. Do you think college textbooks are too expensive?

- Yes
- Neutral
- No
- Other (please specify)

5. In order for open access textbooks to meet the needs of students, which of the following are important? (Please respond to each item.) If other characteristics are important, please add them in the Comment box.

	Very important	Slightly important	Neutral
Texts			
Texts are of high academic quality			
Attractive layout and good graphics			
High quality practice materials included (practice test items; exercises)			
Multimedia supplementary materials included (e.g., interactive exercises;			
Online textbook access is free			
Low cost print copies can be purchased			
Unlimited printing of text permitted (on			
Texts remain accessible/available at any			
Other (please specify) or your comments			

6. **For the fall semester 2009, how many textbooks did you purchase?** (open text field)
7. **For fall semester 2009, how much did you spend to purchase all your textbooks?** (open text field)
8. **Would your student government association be interested in promoting open access textbook usage in Florida through any of these methods? (Please respond to every item)**

	Yes	No	Maybe
Publicize open textbooks on campus			
Provide student teams to inform campus faculty about open textbooks			
Assist in funding open textbook creation			
Other (please specify) or your comments			

9. **(OPTIONAL) Would you like to provide any personal comments to be used to support open textbooks? If so, please provide them below.**

If you would like to have your name associated with these comments, please also provide your name and institution. (open text field)

10. **Please share any comments, concerns, or suggestions you have related to using Open Access Textbooks in Florida. (open text field)**

Thank you for completing this survey!

Appendix E

Survey Results for Student Government Leaders from University, State and Community Colleges

Ida J. Cook, Ph.D., University of Central Florida, Orlando, Florida

Purpose

The purpose of this study has been to collect information from student government leaders regarding their perspectives on using open access textbook materials in Florida. The survey was administered online, using Survey Monkey, and was anonymous and confidential. (For specific wording see Appendix E). It was made available to SGA representatives between November 10, 2009 and January 13, 2010.

Respondents were asked to:

1. Identify the type of institution that they represented (university, four-year/state college, community college, or other).
2. Identify the types of online texts they had used: purchased online texts, rented online texts, free online texts, and online texts delivered via e-readers.
3. Compare online text materials with traditional printed text materials in terms of quality, ease of use, multimedia components, and practice opportunities.
4. Respond whether or not they thought college textbooks were too expensive.
5. Indicate the relative importance of factors that open access textbooks would need in order to meet the needs of students, in terms of academic quality; attractive layout and graphics; high quality practice items; multimedia supplementary materials; free online access to the textbook; low cost print copies available for purchase; free, unlimited printing of text; texts remain accessible/available at any time online or via download.
6. Provide the number of textbooks respondent purchased during fall 2009.
7. Provide the cost of respondent textbooks for fall 2009.
8. Respond as to whether or not their student government association would be interested in promoting open access textbook usage in Florida through any of these methods: publicizing them on campus, providing student teams to inform campus faculty about them, assist in funding open textbook creation.

Survey Results

Most of the survey participants were from universities (see Table 1), with the remainder from 4-year institutions or community colleges.

Table 1. Type of Institution

<u>Type of Institution</u>	
University	16
Four-year college/ State college	2
Community college	2

Total= 20

Note: 3 students from only one community college; 5 from Florida Gulf Coast University (FGCU); 2 from University of Central Florida (UCF); 2 from University of West Florida (UWF); 1 from the University of South Florida (USF), 1 from University of Florida (UF); 1 from Florida State University (FSU); 5 from unidentified institutions.

The respondents reported they had purchased an average 8.3 textbooks of number of textbooks for fall 2009. The average cost of textbooks for one semester (fall) 2009 was approximately \$400.

Types of Online Texts Used by Student Government Leaders

In order to provide a context for respondents' opinions about online materials, they were initially asked to identify the types of materials they had actually used. Table 2 presents the results.

Table 2. Types of Online Text Materials Used by Student Government Leaders.

<u>Types of online text used:</u>	<u>Used</u>	<u>Not used</u>
Purchased online texts	7	13
Rented online texts	2	18
Free online texts	6	14
Online texts via e-readers	2	18

Total = 20

They were then asked to compare the materials to regular printed materials. The majority of respondents had not used online text materials. Of those materials used, one-third had purchased online texts, or used free online text e-readers. See Table 3.

Table 3. Comparison of the Online Texts with Traditional Printed Texts

SGA leaders indicated that in online texts, the quality of multimedia components was better than traditional components. Online text “practice opportunities” were ranked between “better” and “about the same” as practice opportunities for traditional print texts. Respondents judged the quality of online texts to be about the same as print texts.

Opinions about “ease of use” of online texts were mixed, with 8 respondents rating online texts as better in terms of use, and 6 rating them as “not as good” as traditional print texts.

Table 3: Comparison of online texts with traditional printed texts in terms of:

Quality	
Better	1
About the same	13
Not as good	3
DK/	3

Ease of use	
Better	8
About the same	2
Not as good	6
DK/	4

Multimedia Components	
Better	11
About the same	4
Not as good	0
DK/	5

<u>Practice opportunities</u>	
Better	8
About the same	7
Not as good	1
DK/	4

<u>Are college textbooks too expensive?</u>	
yes	16
no	4

Total = 20

Factors Needed in Online Texts to Meet Student Needs

Respondents were then asked about the relative importance of factors they thought online textbooks would need to meet the needs of students (See Table 4).

- Factors that respondents judged to be **very important** for meeting the needs of students were: “High academic quality,” “free online access,” “low cost print copies can be purchased,” “unlimited printing of text permitted” at home, and “texts remain accessible/available at any time online or via download.”
- **Slightly important to neutral** factors were “attractive layout and good graphics;” “high quality practice materials included,” and “inclusion of multimedia supplementary materials.”

“As long as the pages are readable and the version matches or is point blank similar to my Professors, I could care less what condition my text is in. A bind would also be nice. If I feel that I will keep the book, need it or use it for a future class, then I would get a book higher on the quality scale or I would buy it new for myself.” – University respondent [actual quote]

Table 4. Relative Importance of Factors Online Materials Needed to Meet Student

Needs:

High Academic Quality

Very important	17
Slightly important	2
Neutral	1
Not important	

Attractive layout and good graphics

Very important	2
Slightly important	8
Neutral	8
Not important	2

High quality practice materials included (practice test items; exercises)

Very important	7
Slightly important	10
Neutral	1
Not important	2

Multimedia supplementary materials included (e.g., interactive exercises; podcasts)

Very important	5
Slightly important	5
Neutral	4
Not important	6

Online textbook access is free

Very important	15
Slightly important	2
Neutral	3
Not important	1

Low cost print copies can be purchased (average cost of \$50)

Very important	14
slightly important	3
neutral	2
Not important	1

Unlimited printing of text permitted (on home printer)

Very important	15
slightly important	3
neutral	2
Not important	0

Texts remain accessible/available at any time online or via download

Very important	14
slightly important	4
neutral	2
Not important	1

Total = 20

Assistance of Local Student Governments

When the student government leader were asked whether or not their student government association would be interested in promoting open access textbook usage in Florida through any of these methods, they indicated they felt they would do the following:

- The large majority of SGA leaders thought their associations would “publicize open textbooks on campus,” and “provide student teams to inform campus faculty about open access textbooks.”
- Fifty percent of the respondents said their student governments may “assist in funding open textbook creation.”
- One university respondent commented: *“I AM in the Student Government Association at my University and I believe this is a very do-able platform idea. This is a definite option, but I do NOT speak for any majority. As a student this is how a feel, along with being an SGA representative for two years running.”*
[actual quote]

- A community college respondent made this comment: *“I do not like the idea of online text books even if they are cheaper. It would make students lazyer and make it easier for students to cheap just like online classes.”* [actual quote]

Table 5. Types of Assistance from Local Student Governments

Publicize open textbooks on campus

yes	17
maybe	2
no	1

Provide student teams to inform campus faculty about open textbooks

yes	14
maybe	4
no	2

Assist in funding open textbook creation

yes	6
maybe	10
no	2

Total = 20

Respondents were given an opportunity to “...share any comments, concerns, or suggestions you have related to using Open Access Textbooks in Florida.” The following comments were offered [Actual Quotes]:

- *“I prefer to use actual textbooks because I feel they are easier to use. I would rather hold, read, and highlight a book then read it on a computer.”* – University respondent
- *“I don't think you can make this stuff free either believe that is going from one extreme to the next. I think a happy middle ground is something that should be able to be found and handled that way colleges and students are happy but publishing companies are happy as well and are able to stimulate the economy still with actual jobs. It wouldn't be fair to just make them free because that denies revenue to schools and book companies, which is not something our country can handle economically speaking. I think online textbooks is where universities will continue to go as time progresses and bugs are worked out, which is also beneficial to the environment due to not printing so much paper. Online textbooks are a great idea, just find a decent price for them and college students will be happy.”* – University respondent

- *“I do not like the idea of online textbooks. I think that it will be harder to study, end up more expensive, and fail students. Students will not be able to study at study tables in the library for extended amounts of time with out a plug to plug in there computers. If they do print out their "books" so they could study longer with out having to have a computer, it will end up making the cost for students to rise because of the purchase of ink and paper. To refill ink for a printer is more costly then buying a new printers at times. Also students will not learn as much from a online book because they will get distracted with other things like websites i.e. facebook. Also most college student that i know are not organized. So most of them I bet would lose there printouts and not be able to get to a computer to study. Students will fail. we do need cheaper text books BUT online textbooks are NOT the way to go about this.” – Community college respondent*

Conclusions

Overall, it can be concluded that student government leaders have used some form of online textbooks. One-third of those responding had purchased or downloaded free online texts. When comparisons of online materials with printed text materials were made, leaders believed them to be “better” in terms of the multimedia components offered by online textbooks. They were judged to be “about the same” in terms of quality; whereas, opinions were mixed in terms of “ease of use.” A relatively equal number judged the practice opportunities in online textbooks to be better or not as good. Three-quarters of respondents thought college textbooks were too expensive.

As for which factors were the more highly ranked as needed to meet student needs, an overwhelming number ranked high academic quality first, followed by unlimited printing of texts, low cost print copies being available for purchase, and having texts remain accessible/available at anytime or for download. The factors that were less highly ranked were attractive layout and graphics, high quality practice item (texts/exercises) and multimedia supplementary materials (interactive exercises; podcasts).

Student government leaders were most willing to help publicize open access textbooks on their campuses, and to assist in providing student teams to inform their campus faculty/students about open access textbooks. The student government leaders were less supportive of assisting in funding open textbook creation, although one-third agreed that they would support them.

Appendix F

Prioritized List of Florida General Education Courses for Open Access Textbook Adoption/Development

Total Points	Course	Course Name
47.5	MAC X105	College Algebra
42.5	PSY X012	Intro to Psychology
39.5	STA X023	Introduction to Statistics
37.5	ECO 2013	Principles of Macroeconomics
34.5	ECO 2023	Principles of Microeconomics
34.5	MAT X033	Intermediate Algebra
30	AMH 2010	United States History to 1877
30	BSC 2005	General Biology
29.5	CHM X045	General Chemistry (1 OF 2)
29.5	MAC X114	Trigonometry
29	AMH 2020	United States History after 1877
27	DEP 2004	Developmental Psychology: Life Span
24.5	POS 2041	American National Government
24	ENC X101	Freshman Composition Skills I
23	ENC X102	Composition Skills II
22.5	MAC X312	Calculus II w/ Analytic Geometry
22.5	MAC X313	Calculus III with Analytic Geometry
22	MGF X106	Topics in Mathematics /Mathematics for Liberal Arts I
22	SYG 2000	Introductory Sociology
21	BSC 2085	Anatomy and Physiology I
21	BSC 2086	Anatomy and Physiology II
20	BSC X010	General Biology/Core Biology
20	HUM 2210	Humanities I
19.5	PHY 9001 B	Physical Science (category)
16.5	DIV 9001 C	Diversity for Humanities
16.5	MAC X311	Calculus I with Analytic Geometry
16.5	PHY X048	General Physics w/Calculus I (2 sem seq)
16.5	PHY X053	General Physics I (2 sem seq)
16	MAT 0024	Elementary Algebra

16	SPC X600	Public Speaking
15.5	MAC X140	Precalculus
14.5	CHM 2045 L	College Chemistry I Laboratory
9	MGF X107	Mathematics for Liberal Arts II
8	MAP X302	Differential Equations I
7	BIO 9001 A	Biology (category)

Appendix G

Inventory of Open Textbooks Available in The Orange Grove Digital Repository

January 27, 2010

Note: Open Textbooks are frequently added to The Orange Grove. The most current list of textbooks may be viewed at: [The Orange Grove Repository](#).

1. A = B
2. A Comprehensive Outline of World History
3. A Computational Introduction to Number Theory and Algebra
4. A First Course in Linear Algebra.
5. A First Course in Electrical and Computer Engineering
6. A First Course in Linear Algebra
7. A Parent's Guide to Band
8. A Problem Course in Mathematical Logic
9. A Radically Modern Approach to Introductory Physics Volume 1
10. A Radically Modern Approach to Introductory Physics Volume II
11. Advanced Calculus
12. Algebra: Abstract and Concrete
13. American Oil Diplomacy in the Persian Gulf and the Caspian Sea
14. An Introduction to Economic Reasoning
15. AP Environmental Science
16. Archaeological Studies of Gender in the Southeastern United States
17. Basic Political Concepts
18. Basics of Fluid Mechanics
19. Bernard Shaw's Remarkable Religion: A Faith That Fits the Facts
20. Best Practices in Online Teaching
21. Beyond Turk and Hindu: Rethinking Religious Identities in Islamicate South Asia
22. Biology
23. Blown to Bits: Your Life, Liberty, and Happiness after the Digital Explosion
24. Business Ethics
25. Business Fundamentals

26. Business Processes and Information Technology
27. Calculus-Based Physics I
28. Calculus-Based Physics II
29. Cardiovascular Disorders: The Merck Manual of Diagnosis and Therapy
30. Clinical Pharmacology: The Merck Manual of Diagnosis and Therapy
31. Collaborative Statistics
32. College Algebra
33. Computing Life
34. Concept Development Studies in Chemistry
35. Conservation Laws
36. Core Concepts of Marketing
37. Creation Myths and Legends of the Creek Indians
38. Creole Identity in the French Caribbean Novel
39. Dermatologic Disorders: The Merck Manual of Diagnosis and Therapy
40. Destiny Unfulfilled: A Critique of The Harry Potter Series
41. Difference Equations to Differential Equations
42. Download of Psychiatry
43. Econometrics
44. Educational Psychology
45. Electricity and Magnetism
46. Electronic Commerce: The Strategic Perspective (2nd ed.)
47. Elementary Algebra
48. Elementary Calculus: An Infinitesimal Approach
49. Elements of Abstract and Linear Algebra
50. eMarketing: The Essential Guide to Online Marketing
51. Essential Physics Part I
52. Fear and Anxiety in the Arab World

53. Focus on Intellectual Property Rights
54. forall x: Introductory Textbook in Formal Logic
55. Foundations of Modern Arab Identity
56. From Algorithms to Z-Scores: Probabilistic and Statistical Modeling in Computer Science
57. Fundamentals of Electrical Engineering I
58. Gender and the Chivalric Community in Malory's Morte d'Arthur

59. Grinstead and Snell's Introduction to Probability
60. Handbook of Independent Journalism
61. HIV-AIDS for Educators
62. Images of the Woman Reader in Victorian British and American Fiction
63. Immunology; Allergic Disorders: The Merck Manual of Diagnosis and Therapy
64. Influenza Report
65. Information Systems
66. Introduction to Digital Logic with Laboratory Exercises
67. Introduction to Economic Analysis
68. Introduction to Groups, Invariants and Particles
69. Introduction to Open Educational Resources
70. Introduction to Physical Electronics
71. Introduction to Physical Oceanography
72. Introduction to Programming Using Java
73. Introduction to Statistical Thought
74. Introduction to String Field Theory
75. Islam in South Africa: Mosques, Imams, and Sermons
76. Islam, Judaism, and the Political Role of Religions in the Middle East
77. Israel's First Fifty Years
78. Joyce and the Victorians
79. Joyce's Ulysses as National Epic: Epic Mimesis and the Political History of the Nation State
80. Judicial Administration and Space Management: A Guide for Architects, Court Administrators, and Planners
81. Laborers in the Vineyard of the Lord: The Beginnings of the AME Church in Florida, 1865-1895
82. Latino American Literature in the Classroom: The Politics of Transformation
83. Lebanon's Second Republic: Prospects for the Twenty-first Century
84. Liberté: A First Year French Textbook
85. Lie Algebras
86. Linear Algebra
87. "Lives Full of Struggle and Triumph:" Southern Women, Their Institutions, and Their Communities
88. Mathematical Tools for Physics

89. Methods of Discovery: A Guide to Research Writing
90. Modernization in Colombia: The Laureano Gómez Years, 1889-1965
91. Motion Mountain: The Adventure of Physics
92. Nanotechnology for the Oil and Gas Industry
93. Neurologic Disorders: The Merck Manual of Diagnosis and Therapy
94. Newtonian Physics
95. Nutritional Disorders: The Merck Manual of Diagnosis and Therapy
96. Opening Up Education: The Collective Advancement of Education through Open Technology, Open Content, and Open Knowledge
97. Optics
98. Outline of American Literature
99. Outline of the U.S. Legal System
100. Pathway To Dreams
101. Principles of Object-Oriented Programming
102. Producing Open Source Software: How to Run a Successful Free Software Project
103. Programming from the Ground Up
104. Programming Fundamentals: A Modular Structured Approach Using C++
105. Psychiatric Disorders: The Merck Manual of Diagnosis and Therapy
106. Reading Music: Common Notation
107. Rethinking Nasserism: Revolution and Historical Memory in Modern Egypt
108. Rhetoric and Resistance in Black Women's Autobiography
109. Semi-Riemann Geometry and General Relativity
110. Shakespeare and Italy: The City and the Stage
111. Signals and Systems
112. Simple Nature: An Introduction to Physics for Engineering and Physical Science Students
113. Smarthistory: A multi-media web-book about art
114. Sociology 1010
115. Strategies for Sustaining Digital Libraries
116. Superspace or One Thousand and One Lessons in Supersymmetry
117. Syria and the Palestinians: The Clash of Nationalism
118. The Age of Einstein
119. The Archaeology of Traditions: Agency and History Before and After Columbus
120. The Autobiography of María Elena Moyano: The Life and Death of a Peruvian Activist

121. The Basic Elements of Music
122. The Brothers' Vietnam War: Black Power, Manhood, and the Military Experience
123. The Calculus of Functions of Several Variables
124. The Handbook of Essential Mathematics
125. The Jerusalem Problem: The Struggle for Permanent Status
126. The Making of the Modern Iranian Woman: Gender, State Policy, and Popular Culture
127. The Middle East Enters the Twenty-first Century
128. The Modern Revolution in Physics
129. The Novels of Fernando del Paso
130. The Public Domain: Enclosing the Commons of the Mind
131. The Theory and Practice of Online Learning: 2nd edition
132. Theory of functions of a real variable
133. Three Modules on Clear Writing Style: An Introduction to The Craft of Argument
134. Tracing Arachne's Web: Myth and Feminist Fiction
135. Trigonometry
136. Tuberculosis 2007
137. U.S. Monetary Policy: An Introduction
138. Uncertainty in Engineering Analysis: Elementary Probability and Statistics for Engineers
139. Understanding Algebra
140. US History since 1877
141. USA Elections in Brief
142. USA Literature in Brief
143. Vector Calculus
144. Vibrations and Waves
145. Virtual Worlds: A Second Life Beginner's Guide
146. What is Biodiversity
147. Wireless Networking in the Developing World: A practical guide
148. Women in Argentina: Early Travel Narratives
149. Women in the Discourse of Early Modern Spain
150. Women of Influence
151. Yet Another Calculus Text: A Short Introduction with Infinitesimals

Appendix H

Florida Colleges of Medicine Open Educational Resources Taskforce

The Problem:

- Inability of Florida Colleges of Medicine libraries to license at a reasonable rate, and often at any rate, the electronic textbooks required for courses or clerkships within the curriculum.
- The out of control cost of textbooks, which places an undue hardship for medical students who must either purchase their own textbooks or rely on the library's print reserve copies.

Background

The Orange Grove Digital Repository (OGR) is a digital repository of K-20 teaching materials managed by the Florida Distance Learning Consortium. Located at FSU's Innovation Park, the Florida Distance Learning Consortium was created in 1996 to "provide coordination among Florida's colleges and universities in the development, delivery, marketing, and acquisition of distance learning instruction and its infrastructure," and receives funding from the Florida legislature.

Since the OGR has been in existence, it has collected and makes available over 2000 digital resources that can be used by faculty in distance and classroom courses. These digital resources are gathered through direct import by authors or creators of the content into the OGR or harvested by the OGR from other regional or national repositories such as the Florida on Florida Collection of the Florida Electronic Library, MERLOT, PALMM (Publication of Archival, Library and Museum Materials), and the Library of Congress. MedEdPortal, the peer reviewed collection of teaching modules sponsored by the Association of American Medical Colleges, could be added to this list of digital resource repositories that are harvested through federated searching techniques.

In 2009, the Florida legislature formed an Open Access Textbook Task Force (HB 7121 or SB 844) "to create an inventory of existing open access textbooks; make recommendations for encouraging and promoting faculty development and use of open access textbooks; and to identify barriers to the implementation of open access textbooks." Barbara Shearer, FSU COM Director of the Maguire Medical Library, serves on this task force. The report of the task force to the legislature is due March 1, 2010. A statewide survey has been distributed to all faculty and administrators in Florida universities and colleges to learn about knowledge of and interest in open access textbook publishing. Data from this survey will provide useful insights into the feasibility of developing open access textbooks for specific disciplines, including medicine.

John Byram, Editor-in-chief, University Press of Florida (UPF) serves as an advisor to the Taskforce, and has already partnered with the OGR in making accessible in electronic and print format over 100 textbooks, many in general undergraduate education in areas such as history, algebra and physics. The UPF is also adding a number of scholarly monographs to the open textbooks collection, also to be offered in print and electronic formats. The announcement of this initiative (*Orange Grove Texts Plus*) was made at the September 24, 2009, Board of Governors meeting by Chancellor Frank Brogan.

The joint effort between the OGR and the UPF is working to identify some of the open textbook content already in the repository and to link texts to specific Florida course numbers for general undergraduate courses. To date, no courses have been linked. The next step is to create content specific to courses by faculty members themselves.

The Florida State University Dean has created a College of Medicine Taskforce on Open Educational Resources, chaired by Barbara Shearer. The FSU COM Taskforce includes 5 education and course directors and 1 faculty member from the department of Medical Humanities and Social Sciences. This taskforce will investigate the feasibility of the COM to produce open educational resources to support FSU COM courses and clerkships and will deliver a report to the Dean by September 1, 2010, with recommendations for the development of open educational resources for the FSU COM.

To make this effort productive for all Florida medical schools, the directors of all medical school libraries will form a taskforce for the purpose of sharing and building on information gathered by the FSU COM taskforce. This "Florida Colleges of Medicine Taskforce on Open Educational Resources" will explore the feasibility of all Florida Colleges of Medicine to collaborate in the development of open access textbooks and other curriculum materials that may comprise components of open access textbooks.

Charge of State of Florida Colleges of Medicine Taskforce on Open Educational Resources:

Investigate the feasibility of the Florida Colleges of Medicine to collaborate in producing open educational resources to support courses and clerkships taught at Florida Colleges of Medicine.

Proposed Tasks for the Taskforce:

- Learn about medical education resource repositories and determine if there are opportunities to collaborate.
- Explore the relationship between OrangeGrove and MedEdPortal (or other appropriate scholarly health sciences repositories) as opportunities to collaborate.
- Identify in-house editorial and faculty peer review processes.
- Explore the concept of a course pack approach to developing open educational resources among Florida medical schools. As an example, each school would contribute to the core content for a course/clerkship under the auspices of an editorial committee which would ensure that all areas are covered and to provide

- a peer review process. Content could then be enhanced by each medical school to ensure that its particular course objectives have been met.
- Explore ways this project could interface with the UPF. Could the UPF provide an infrastructure in the form of editorial staff, peer review process, marketing, IT support, instructional design support, etc?
 - Investigate what can be done to move open access publishing into the mainstream, i.e., explore ways barriers can be removed to encourage and support medical faculty to publish in open educational resources.
 - Develop a status report for college of medicine deans by December 1, 2010, on the feasibility of and if appropriate, the progress toward, producing an open access textbook/open educational resource for Florida Colleges of Medicine.

Challenges:

- To make this financially self-sustaining through sales of print on demand, podcasts, test question banks, Kindle products, case studies, and other methods.
- To provide the same level of promotion and tenure incentives that are in place for publishing in mainstream print publications.
- To provide appropriate compensation or other equally compelling motive for faculty who might otherwise choose a mainstream print publisher for publication of his/her intellectual property.

Opportunities:

- Florida College of Medicine libraries are pledged to provide as much content to students as possible to support their learning during courses and clerkships. It is increasingly difficult to identify this content in electronic format that can be licensed by the library. This initiative removes this barrier and will provide free multimedia educational information to students who may then opt to pay for the information in a bound, print format or in other formats (i.e., as podcasts).
- Publishers are resistant to multimedia approaches. This initiative removes this restriction.
- We keep the intellectual capital of Florida faculty in the state to do the state's work rather than subsidizing publishers who then charge libraries and students for this content at rates that are becoming increasingly prohibitive.

Task Force Members:

David Boilard, Director, Medical Library, Herbert Wertheim College of Medicine,
Florida International University

Cecilia Botero, Associate Dean of the George A. Smathers Libraries and
Director of the Health Science Center Libraries, University of Florida

Nadine Dexter, Director - Harriet F. Ginsburg Health Sciences Library, and
Director Medical Informatics University of Central Florida College of
Medicine

Mary Moore, Executive Director; Louis Calder Memorial Library and Biomedical Communications, University of Miami Miller School of Medicine, Miami

Kaye Robertson, Director at the Health Professions Division Library, Nova Southeastern University, Fort Lauderdale

Beverly Shattuck, Associate Vice President of Libraries, USF Health Director, Shimberg Health Sciences Library, University of South Florida

Barbara Shearer, Director, Charlotte Edwards Maguire Medical Library, Florida State University (Chair)

Roxann Williams, Charlotte Edwards Maguire Medical Library, Florida State University (Project Manager)

Appendix I

Florida State University College of Medicine Open Educational Resources Taskforce

Prepared by Barbara Shearer, MSLS, Director, Maguire Medical Library

January 25, 2010

The Problem:

- Inability of the Florida State University College of Medicine (FSU COM) Maguire Medical Library to license at a reasonable rate, and often at any rate, the electronic textbooks required for over half of the courses or clerkships within the COM curriculum.
- The out of control cost of textbooks, which places an undue hardship for medical students who must either purchase their own textbooks or rely on the library's print reserve copies.

Background:

The Orange Grove Digital Repository (OGR) is a digital repository of K-20 teaching materials managed by the Florida Distance Learning Consortium. Located at FSU's Innovation Park, the Florida Distance Learning Consortium (FDLC) was created in 1996 to "provide coordination among Florida's colleges and universities in the development, delivery, marketing, and acquisition of distance learning instruction and its infrastructure," and receives funding from the Florida legislature. [In 2009, the FDLC was formally established by legislative act.]

Since the OGR has been in existence, it has collected and makes available over 2000 digital resources that can be used by faculty in distance and classroom courses. These digital resources are gathered through direct import by authors or creators of the content into the OGR or harvested by the OGR from other regional or national repositories such as the Florida on Florida Collection of the Florida Electronic Library, MERLOT, PALMM (Publication of Archival, Library and Museum Materials), and the Library of Congress. MedEdPortal, the peer reviewed collection of teaching modules sponsored by the Association of American Medical Colleges, could be added to this list of digital resource repositories that are harvested through federated searching techniques.

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administrators in Florida universities and colleges to learn about knowledge of and interest in open access textbook publishing. Data from this survey provides useful insights into the feasibility of developing open access textbooks for specific disciplines, including medicine.

John Byram, Editor-in-chief, University Press of Florida (UPF) serves as an advisor to the Taskforce, and has already partnered with the OGR in making accessible in electronic and print format over 100 textbooks, many in general undergraduate education in areas such as history, algebra and physics. The UPF is also adding a number of scholarly monographs to the open textbooks collection, also to be offered in print and electronic formats. The announcement of this initiative (Orange Grove Texts *Plus*) was made at the September 24, 2009, Board of Governors meeting by Chancellor Frank Brogan.

The joint effort between the OGR and the UPF is working to identify some of the open textbook content already in the repository and to link texts to specific Florida course numbers for general undergraduate courses. To date, no courses have been linked. The next step is to create content specific to courses by faculty members themselves.

Charge of FSU College of Medicine Taskforce on Open Access Textbooks:

Investigate the feasibility of the COM to produce open access textbooks to support FSU COM courses and clerkships.

Proposed Tasks for FSU College of Medicine Task Force on Open Access Textbooks:

- Learn about medical education resource repositories and determine if there are opportunities to collaborate.
- Explore the relationship between OrangeGrove and MedEdPortal as opportunities to collaborate. (Unless another mechanism for peer review is developed for the FSUCOM, MedEdPortal can be used to peer review COM resources before including them in OrangeGrove.)
- Identify in-house editorial and faculty peer review process for proposed FSUCOM content for OrangeGrove.
- Make contacts with other medical schools/medical libraries in Florida to assess interest in a joint venture.
- Explore the concept of a course pack approach to developing open access textbooks among Florida medical schools. As an example, each school would contribute to the core content for a course/clerkship under the auspices of an editorial committee which would ensure that all areas are covered and to provide a peer review process. Content could then be enhanced by each medical school to ensure that its particular course objectives have been met.
- Explore ways this project could interface with the UPF. Could the UPF provide an infrastructure in the form of editorial staff, peer review process, marketing, IT support, instructional design support, etc?
- Investigate what can be done to move open access publishing into the mainstream, i.e., explore ways barriers can be removed to encourage and support medical faculty to publish in open access textbooks.
- Develop a proposal by September 1, 2010, for the FSUCOM Dean outlining recommendations for an open access textbook/open educational resource for FSUCOM and if feasible, identify potential partners at other Florida medical schools. This proposal

would include cost estimates for faculty release time to produce content, hardware and software, instructional media costs and other costs to be identified.

Challenges:

- To make this financially self-sustaining through sales of print on demand, podcasts, test question banks, Kindle products, case studies, and other methods.
- To provide the same level of promotion and tenure incentives that are in place for publishing in mainstream print publications.
- To provide appropriate compensation or other equally compelling motive for faculty who might otherwise choose a mainstream print publisher for publication of his/her intellectual property.

Opportunities:

- The COM is pledged to provide as much content to students as possible to support their learning during courses and clerkships. It is increasingly difficult to identify this content in electronic format that can be licensed by the library. This initiative removes this barrier and will provide free multimedia textbook information to students who may then opt to pay for the information in a bound, print format or in other formats (i.e., as podcasts).
- Publishers are resistant to multimedia approaches. This initiative removes this restriction.
- We keep the intellectual capital of Florida faculty in the state to do the state's work rather than subsidizing publishers who then charge libraries and students for this content at rates that are becoming increasingly prohibitive.

FSU College of Medicine Task Force Members:

Chair: Barbara Shearer, Director, Maguire Medical Library

Project Manager: Roxann Williams, Special Projects Librarian, Maguire Medical Library

Jon Appelbaum, Education Director, Internal Medicine

Lisa Granville, Associate Chair, Geriatrics and Year 1 Doctoring Course Director

Mary Johnson, Assistant Dean for Faculty Development and Medical Microbiology
Course Director

Kathy Lee, Education Director, Psychiatry

Michele Manting, Education Director, OB/GYN

Carol Painter, Assistant Professor, Medical Humanities and Social Sciences

Appendix J:

J1: The Charge to the Task Force

The legislation specified seven responsibilities (listed below) which aided in developing the plan and recommendations:

1. Inventory of existing open access textbooks.
2. Listing of undergraduate courses, in particular the general education courses, that would be recommended for the use of open access textbooks.
3. A standardized process for the review and approval of open access textbooks.
4. Recommendations for encouraging and promoting faculty development and use of open access textbooks
5. Identification of barriers to the implementation of open access textbooks.
6. Strategies for production and distribution of open access textbooks to ensure such textbooks may be easily accessed, downloaded, printed or obtained as a bound version by students at either reduced or no cost.
7. Identification of the necessary technology security standards and guidelines to safeguard the use of open access textbooks.

J2: Task Force Activities

1. The entire committee met 9 times by combined conference call and Elluminate web conference sessions to save time and travel costs. Initially, background information and presentations were provided to ensure that committee members and resource persons were using the same vocabulary and were apprised of legislation, existing initiatives, and market developments that impact open access textbooks.
2. The OATTF's research and resource identification were assisted by the participation of several OATTF members in the Textbook Affordability Task Force (2009): a statewide work group that provided recommendations to the State University System's Board of Governors (BOG) in development of a regulation to guide each institution's compliance with federal and state legislation. This resource provided analysis of activities in other state higher education systems, the work of Student PIRGs, industry analyses and recent developments in open access educational materials.
3. The OATTF examined work in progress related to the task force charge and built on the expertise of task force members and their organizations.
 - a. Research was conducted to identify the largest enrollment courses in public postsecondary education. Data was obtained from research staff at the BOG and Division of Florida Colleges (DFC). The reasoning behind this was that the highest enrollment courses would be among those courses with the highest demand for textbooks and other instructional materials.

- b. Florida College System's Textbook Affordability Committee was operating concurrently and collaboratively sharing information and resources. This committee's legislatively required report, completed November 1, 2009, informed and was informed by the work of the OATTF.
 - c. The Florida Board of Governor's Textbook Affordability report provided valuable background information as well as the OPPAGA Textbook Affordability Study (08-29).
 - d. The Florida Distance Learning Consortium – A project of the FDLC is The Orange Grove Digital Repository which archives numerous digital resources for educational purposes, including Open Access Textbooks.
 - e. Orange Grove Texts *Plus*, a new collaborative effort between The Orange Grove Digital Repository and the University Press of Florida, provides access to online or print-on-demand open access textbooks that will initially target high enrollment general education courses. This emerging initiative was a source of valuable information and identified actual needs without additional cost to the state.
4. Surveys were designed and conducted to gather input from Florida higher education faculty members, administrators and student government leaders.
- a. Faculty and Administrator Survey– The survey was developed collaboratively among task force members (view a copy in Appendix C). It was endorsed by both public higher education systems and distributed to all institutions for dispersal to faculty and administrators. The survey was administered online and was available to participants from October 6 through 28, 2009. A detailed report of the results of this survey is presented as Appendix B.
 - b. Student Government Leadership Survey – The survey was developed to identify student concerns and preferences regarding textbook costs and options for access (view a copy in Appendix E). The survey was administered online and was available to participants from November 20 through January 5, 2010. Survey results are presented in Appendix D.
5. Related FDLC Grants
- a. With financial support from USDOE Fund for the Improvement of Postsecondary Education (FIPSE), The Orange Grove staff developed and offered a one day international conference in Vancouver, British Columbia on digital repositories in August 2009. (This conference preceded the International Open Education Resource Conference which The Orange Grove staff attended.) Open textbooks were a significant conference topic which continues to be discussed among members of the international repository community. Contacts made during these conferences have informed and benefitted the work of the OATTF. For example, the state of Florida became a partner in a Hewlett grant to Foothill College, Palo Alto, California to train faculty advocates for open access textbooks. The Hewlett grant paid for over 60 Florida faculty to participate in training at three locations in Florida during January, 2010. Regular interaction with contacts at other institutions or entities interested in open access textbooks is helpful to discover new textbooks and discuss issues.
 - b. The Orange Grove Digital Repository has received a second FIPSE grant to produce a sustainable model to discover, produce, and disseminate open textbooks. Collaboration has begun with other universities, states and consortia involved in open textbook production and dissemination and will continue to inform Florida's efforts.