# Implementation Guide of OER and Low-Cost Labeling Policies for Washington Community and Technical Colleges

OER and Low-Cost Labeling Policies are two state coding policies that require the specific labeling of courses that use open educational resources and low-cost materials respectively. These labels appear as course attributes on the class search page which allows students to filter for courses that specifically use OER or Low-Cost materials. This helps our students make more informed choices at the time of registration.

OER/Low-Cost labeling policies are included in the SBCTC coding manual as global course attributes and have been also codified in the state law (RCW 28B.50.789). Colleges are required to inform students of which courses use OER and Low-Cost materials at the time of registration no later than a quarter after the college moves to ctcLink. This law has a clear reporting structure to the legislature and SBCTC is tasked with monitoring the progress.

The Washington Community and Technical College system has gone through multiple rounds of statewide studies including one student survey with 10,050 responses from WACTC students. See **Appendix A** for a full list of study reports.

This guide provides Washington's community and technical colleges with a detailed overview of labeling policies and practical implementation tools including a decision tree and case examples.

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# OER labeling Policies

## Name[1]

OER: No Textbook to Purchase

## Description

The required instructional materials are provided online at no cost. A printed version and some supplementary course materials may be available for purchase in the bookstore.

## Definition and Criteria

**To be designated as an OER course**, a course should use Open Educational Resources (OER) as the primary, required instructional materials for the course.

**Open Educational Resources (OER)** are resources released either under an open license or in the public domain permitting their free use, repurposing, and sharing.

- **The following expenses should not be factored** into the consideration:
    - **Tools and supplies cost**, such as a lab coat, goggles, notebook paper, art materials, thumb drives, or calculators
    - **Auxiliary fees**, such as a lab fee, technology fee, testing fee, or eLearning fee

[1] Note that the name and the description of the OER code were intentionally simplified to offer easy-to-understand and intuitive names to the students.

- **Common authoring software**, such as Microsoft Word, PowerPoint, Excel, or Outlook
- **Small copying/printing costs**

## Qualified cases for labeling as OER courses

- **Use of adopted open textbooks or materials** regardless of the format. For example, courses that use a printed version of open textbooks or materials with a small printing and handling cost.
- **Use of a faculty-developed textbook or materials with** an open license or public domain designation.
- **Use of a faculty-developed textbook or materials without** an open license or public domain designation, if
  - materials are freely accessible by the students and students are allowed to keep them after the course is completed, **and**
  - faculty plan on releasing the materials with an open license or public domain designation when ready.
- **Use of open textbook or materials as required course materials** while supplemented by other copyrighted materials with all rights reserved.
- **Use of a combination of OER and the campus library resources** as required course materials, if
  - *OER provide the primary foundation of the required instructional materials*, **and**
  - the resources from the campus library are offered free of charge to the students

## Insufficient cases for labeling as OER courses

- **Use of OER as a supplementary course material** while using a commercial textbook as the primary course material.
- **Use of OER with software or online sites that require the purchase** of software or licenses permitting the use of materials. For example, courses

that require the purchase of an access code to do homework or read primary course materials are not to be designated as OER courses.

- **Publisher content included in tuition or course fees**, such as the online course materials provided through Inclusive Access Program or First Day program are not to be marked with the OER code. It may, however, be labeled as Low-Cost if the course fee for each student is $50 or less.
- **Third-party bookstore products**, such as Barnes and Noble Complete and Follet ACCESS are not to be marked with the OER code unless the content is publicly available with a clear terms of use that allows free public access. It may, however, be labeled as Low-Cost if the course fee for each student is $50 or less.
- **Courses that traditionally do not require** any course materials are not to be coded as an OER course, such as aerobics, yoga, or sports dance class. These types of courses should be coded as Low Cost.

  To learn more about open license and the public domain, visit Module 1 Introduction in How to Use Open Educational Resources.

**Note, if a course's required course materials are not determined** prior to registration, the class section cannot be evaluated against the OER labeling criteria.

# Low-Cost labeling Policies

## Name

Low-Cost Textbooks

## Description

The required instructional materials cost $50 or less; there may be additional mandatory equipment or supplies to purchase.

## Definition and Criteria

**To be designated as a Low-Cost course**, the combined cost of the required course materials should be $50 or less. This label is to tag the courses that use other affordable course materials that do not necessarily fit into the criteria of OER label.

- **This includes** ALL required instructional materials such as textbooks, websites, software programs, apps, courseware packages, access codes to homework websites, etc.
- **The following expenses shouldn't be factored into the consideration**
    - **Tools and supplies**, such as a lab coat, goggles, notebook paper, art materials, thumb drives, or calculators
    - **Common authoring software**, such as Microsoft Word, PowerPoint, Excel, or Outlook
    - **Auxiliary fees**, such as a lab fee, technology fee, testing fee, or eLearning fee
    - **Small copying/printing costs**

**The $50 threshold is based on the pre-tax retail price** (the textbook before taxes cannot exceed $50), and is applied to all class sections regardless of the number of credits offered.

- **The labeling is applied to an individual class section of a course**, not to the overall course itself.
- **The threshold is based on the price** at the campus bookstore or charged by the publisher directly, whichever is Lower.
- **Prorating the book cost** based on the number of credits or number of sections used is *not* allowed. For example, a $100 textbook spanning two quarters is not to be prorated 50/50, thus not to be labeled Low-Cost.

**Consider the cost of not only new, but used, rented, and older editions** of the required materials.

- **For used, rented, and older editions** to be included in the Low-Cost labeling,
    - students should be able to acquire the materials for $50 or less either from the college bookstore or the publisher directly and
    - the college bookstore/the publisher *must* have sufficient stock for all enrollments.
- **Prices offered by other third-party vendors** such as Amazon.com are *not* to be considered due to price fluctuation and uncertainty of stock availability.

**A lecture course with an associated lab section must be coded together** if lecture courses are integrated with lab sections (lecture and lab are simultaneously registered into a single course).

- **A combined cost for the required instructional materials** from lecture and lab should be $50 or less in order to be labeled as Low-Cost. This excludes the lab fee and the cost for any supplies or equipment needed for the lab section.
- **A lecture with a lab may be coded separately** only if they require separate registration with independent section numbers.

## Examples of courses meeting the Low-Cost threshold

- **Use of an inexpensive commercial textbook** costing $50 or less

- **Use of a course material bundle** (e.g., textbook and homework website) costing $50 or less
    - A textbook costing $30 and online homework site costing $20
- **Use of faculty-developed course packages** costing $50 or less

## Examples of courses that do not meet the Low-Cost threshold

- Textbook costing $50 and online homework site costing $150
- Textbook costing $150, but it is used for 3 courses in a sequence

**Note, if a course's required course materials are not determined prior to registration**, the class section cannot be evaluated against the Low-Cost labeling criteria. The Low-Cost code cannot be applied until the cost has been determined.

# Sample Cases that may be labeled OER or Low-Cost

Check some sample cases to see if any are applicable to your situation. Also, try the OER & Low-Cost Labeling Tool to see if it aids in labeling.

### To be labeled OER

- Case ❶ minimal printing & handling cost
- Case ❷ course package with multiple resources
- Case ❸ supplementary use of commercial textbooks
- Case ❹ faculty's own creation, yet to be openly licensed
- Case ❺ use of links to external websites
- Case ❻ combination of OER and the campus library resources

### To be labeled Low-Cost

- Case ❶ $50 or less pre-tax retail price
- Case ❷ directly from the publisher
- Case ❸ tools and supplies not included
- Case ❹ use of used, rented and older editions
- Case ❺ lecture course with associated lab sections

# To be labeled OER

## Case ❶ minimal printing & handling cost

✓ Professor Zbornak uses an openly licensed textbook as the primary, required course material for her statistics 101 class. The online version is available for free download, but most students select the printed version because of its minimal printing and handling costs.

*Use of adopted open textbooks or materials quality for OER labeling regardless of the format. This includes courses that use a printed version of open textbooks, or materials with a small printing and handling cost. Thus this course section may be labeled OER.*

## Case ❷ course package with copyright-cleared resources

✓ Professor Nylund developed her own course materials combining multiple resources. They are mostly copyright-cleared materials, such as her original writings, simple links to external websites, openly licensed resources, or public domain works. Students are allowed to freely access, download, modify, share, and keep the materials after the course is completed.

*As long as all primary, required course materials are cleared of copyright, the course may be labeled OER.*

## Case ❸ supplementary use of commercial textbooks

✓ Professor Devereaux uses an open course package she discovered online as primary course materials for her Chemistry 201 course. She does have a few other commercial textbooks and paid reference sites listed in the syllabus, but they are only optional and supplementary, NOT primary and required.

*As long as all primary, required course materials are open educational resources, the course may be labeled OER.*

## Case ❹ faculty's own creation, yet to be openly licensed

✓ Professor Petrillo wrote his own textbook and uses it for his Math 201 class. Students are allowed to freely download, modify, share, and keep it. She is still editing the content as she teaches and plans on releasing the materials with an open license or to the public domain when ready.

*Use of a faculty-developed textbook (or materials) without an open license or public domain designation is a qualified case for OER labeling, given that (1) materials are freely accessible by the students and students are allowed to keep them after the course is completed, and (2) faculty plan on releasing the materials with an open license or public domain designation when ready. Thus this course section may be labeled OER.*

## Case ❺ use of links to external websites

✓ Professor Westen curated a wide range of resources to be used as primary course materials. They include many links to external websites (e.g., YouTube, Khan Academy).

*While the resources linked to are copyrighted with all rights reserved, the professor only added the links to those external sites as opposed to copying/pasting the original content. Courts generally agree that linking to another website does not infringe the copyrights of that site, nor does it give rise to a likelihood of confusion necessary for a federal trademark infringement claim. Thus this course section may be labeled OER.*

## Case ❻ combination of OER and the campus library resources

✓ Professor Glenanne uses a combination of OER and the articles from the school library database as required course materials for her Biology 101 course. OER provides the bulk of the required course content that maps to students' learning outcome of the course.

*Using a combination of OER and the campus library resources allows the course to be labeled OER, if OER provides the primary foundation of the required instructional materials, and resources from the campus library are offered free of charge to the students.*

# To be labeled Low-Cost

## Case ❶ $50 or less pre-tax retail price

✓ Professor Axe offers a course material bundle to his students in the Organic Chemistry 201 class this quarter. It contains a textbook costing $38 before tax ($41.53 after-tax) and an online homework site costing $10. The combined cost of these instructional materials is $48 before tax ($51.53 after tax).

*The class may be labeled Low-Cost as the $50 threshold is based on the pre-tax retail price.*

## Case ❷ directly from the publisher

✓ Professor Potter makes a deal with a publisher so that the course textbooks can be purchased directly from the publisher with a $45 price tag for all students in his class.

*The threshold is based on the price at the campus bookstore or charged by the publisher directly, whichever is Lower. This guarantees consistent pricing and availability without fluctuation. Thus this course section may be labeled Low-Cost.*

## Case ❸ tools and supplies not included

✓ Professor Spencer teaches Medical Lab Technology 121. His choice of required instructional materials (textbooks, handouts, & homework websites) cost less than 50 dollars combined. Additionally, his course requires purchasing lab tools such as a lab coat and goggles. Lab fees and technology fees are also included.

*His class may be labeled Low-Cost despite the additional costs for the lab tools and associated fees as the combined cost for all instructional materials is $50 or less; the $50 threshold does not include the costs associated with tools, supplies, small copying/printing, and course fees. Thus this course section may be labeled Low-Cost.*

## Case ❹ use of used, rented, and older editions

✓ Professor Guster always looks for more affordable versions of textbooks, such as used, rented, and older editions. For her Logic 201 class this quarter, she sets the older editions of the textbook as the primary course material. She makes sure that students will be able to purchase the older editions for $50 or less either from the college bookstore or the publisher directly, and the college bookstore/publisher will have sufficient stock on hand for all students.

*Used, rented, and older editions can be included in the Low-Cost labeling if (1) students are able to purchase the materials for $50 or less either from the college bookstore or the publisher directly and (2) the college bookstore/the publisher*

*has sufficient stock on hand for all enrollments. Thus this course section may be labeled Low-Cost.*

## Case ❺ lecture course with associated lab sections

✓ Professor Lassiter teaches ASTR 101 with a lab. The combined cost for the required instructional materials for both is $50.

*A lecture course with an associated lab section must be coded together if lecture courses are integrated with lab sections (lecture and lab are simultaneously registered into a single course). A combined cost for the required instructional materials from lecture and lab should be $50 or less in order to be labeled as Low-Cost. Thus this course section may be labeled Low-cost.*

# Appendix A: Study Reports

Multiple rounds of statewide studies have supported and guided the establishment process of the OER & Low-Cost Codes.

- 2015 Faculty & Staff Qualitative Study on OER support
- 2016-2017 Faculty & Staff Survey on OER Code
- **2017 Student Survey on Low-Cost Threshold**
    - research brief & slide presentation
    - interactive dashboard
- 2018 Faculty & Staff Survey on Low-Cost code