(http://www.calstate.edu/)

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(http://www.universityofcalifornia.edu/)

Request for Proposals for California's Open Educational Resources Adoption Incentive Program Funded by AB 798

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1.0 Background Resources

1.1 Legislative Materials

- AB 798 (http://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201520160AB798)
- Assemblywoman Bonilla's summary of AB 798 (docs/3-2-15 College Textbook Affordability Act Fact Sheet.pdf)
- SB 1052 (http://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201120120SB1052)
- SB 1053 (http://leginfo.legislature.ca.gov/faces/billNavClient.xhtml?bill_id=201120120SB1053)

1.2 Requirements of Course Materials Supported by Program

While open education resources may be defined in various ways, Section 67423 of California Education Code, as amended by AB 798 (Bonilla, 2015) describes a range of educational content that can be adopted in the program. The basic requirements for all the course materials supported by this program are that the course materials must be FREE to students and the students (and faculty) have the proper permission (e.g. license) to use the material in the courses. Within the legislation, the requirements are defined as "high-quality teaching, learning, and research resources that:

1. Reside in the public domain or
2. Have been released under an intellectual property license, such as a Creative Commons license, that permits their free use and repurposing by others, and
3. May include other resources that are legally available and free of cost to students. [These "other resources" can include your campus' electronic library resources that all students in the course would have legal and concurrent access to use for the entire term of the course]

Open educational resources include, but are not limited to, full courses, course materials, modules, textbooks, faculty-created content, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge."

"All new open educational resources developed and available that are adopted as course material pursuant to this program shall be added to the California Open Online Library for Education established in Section 66408."

1.3 About Creative Commons Licensing

Creative Commons is a nonprofit organization that enables the sharing and use of creativity and knowledge through free legal tools.

Creative Commons provides free, easy-to-use copyright licenses (http://creativecommons.org/licenses/) which provide a simple, standardized way to give the public permission to share and use your creative work — on conditions of your choice. CC licenses let you easily change your copyright terms from the default of "all rights reserved" to "some rights reserved (http://wiki.creativecommons.org /FAQ#What_does_.22Some_Rights_Reserved.22_mean.3F)."

Creative Commons licenses are not an alternative to copyright. They work alongside copyright (http://wiki.creativecommons.org/FAQ#How_do_CC_licenses_operate.3F) and enable you to modify your copyright terms to best suit your needs.

- More About Creative Commons (https://creativecommons.org/about/)
- More About Creative Commons Licenses (https://creativecommons.org/licenses/)

1.4 The California Open Educational Resources Council (CA OER Council) (http://icas-ca.org/coerc)

The CA OER Council is composed of 9 faculty appointed by the Intersegmental Committee of Academic Senates, 3 from the California Community Colleges, 3 from the California State University and 3 from the University of California, as directed by legislation SB 1052. The CA OER Council has been instrumental in identifying 50 courses common to the 3 California higher education systems, identified many free and open etextbooks that faculty could use as course materials for these courses, implemented a rigorous faculty review process for evaluating the quality of the free and open etextbooks, and engaged in a variety of research and policy

development to support the adoption of free and open textbooks in California higher education.

- More about CA OER Council's responsibilities (http://icas-ca.org/duties-of-coerc)
- More about CA OER Council's membership (http://icas-ca.org/coerc-participants)
- More about CA OER Council's activities (http://icas-ca.org/progress-reports)

1.5 The California Open Online Library for Education (COO4Ed) (http://www.cool4ed.org)

The California Legislature Senate Bill 1053 (http://leginfo.legislature.ca.gov/faces /billNavClient.xhtml?bill_id=201120120SB1053) called for the creation of the California Digital Open Source Library by the CSU so California faculty can easily find, adopt, utilize, and/or modify OER course materials for little or no cost. The legislation directed the California State University to design the free and open digital library that would leverage its existing online open library of OER – MERLOT (http://www.merlot.org) (Multimedia Educational Resource for Learning and Online Teaching) and its Affordable Learning Solutions (http://als.csuprojects.org) initiative. The legislation clearly stated that nothing in the legislation shall be construed to mandate faculty use of any particular textbook or related materials.

The COOL4Ed (http://www.cool4ed.org) (California Open Online Library for Education, www.cool4ed.org provides free, open, and easy to use tools to:

- Find free and open etextbooks (http://www.cool4ed.org/courseshowcase.html), include those with Creative Commons licenses aligned with 50 courses
- Find faculty reviews (http://www.cool4ed.org/reviews.html) of the quality of the free and open etextbooks
- Find California faculty showcasing how they have adopted free and open etextbooks in their courses, including sharing their syllabi
- Find a wide range of free and open educational resources including
  - Free and Open eTextbooks (http://www.cool4ed.org/findetextbooks.html)
  - Online Course Modules (http://www.cool4ed.org/findcoursematerials.html)
  - Online Courses (http://www.cool4ed.org/findonlinecourses.html)
  - Open Access Journal Articles (http://www.cool4ed.org/findjournalsandarticles.html)

1.6 MERLOT: Multimedia Educational Resource for Learning and Online Teaching (http://www.merlot.org)

Established in 1997 by the California State University, MERLOT has provided free access to free and open educational resources to teachers and learners around the world. The California Community Colleges have been a partner in the MERLOT consortium for over a decade. Not only can any faculty, staff or student join MERLOT for free but with their free membership, they can create their own personal OER collection or a more comprehensive course ePortfolio. MERLOT provides a free and open website development tool, MERLOT Content Builder, which is very easy to use and enables people to design and integrate multimedia and documents into a clean website and apply a Creative Commons license easily.

The COOL4Ed online library is built upon the infrastructure of MERLOT.

2.0 Timeline and Process for Proposal Evaluation, Awarding Funds, and Reporting Outcomes

Date	Activities
	2016
February 4, 2016	RFP released along with support materials

February- June 2016	CA-OERC and COOL4Ed will provide a series of informational webinars on OER, campus proposals, and faculty involvement, such as: Feb: Overview of program – planning your proposal March: Shaping your program and leveraging existing resources April: Engaging Faculty in textbook affordability programs June: Submitting Your Proposal [Information about webinars will be provided on www.cool4ed.org (http://www.cool4ed.org)]
March 2, 2016:	Conference for CCC and CSU to support development of successful proposals
April-June, 2016	CA-OERC Consultation (review drafts, information webinars on RFP)
June 30, 2016	CCC and CSU campus proposal submitted to COOL4Ed website. Campuses can submit their proposals earlier if they choose.
July 1-August 30, 2016	CA-OERC reviews applications and recommends initial project funding to CSU Chancellor
September 30, 2016	CSU Chancellor announces awards and transfers funding to campuses. Opportunity for campuses to amend their proposal in accordance with RFP rules.
Sept to December 2016	CA OER Council supports awardee's implementation of their plans
October 2016	COOL4Ed publishes the awardee's abstract of narrative proposals on website along with estimated savings to be produced by campus plans
Sept 2016 to June 2017	COOL4Ed supports awardee's implementation of their plans
	2017
June 30, 2017	Progress reports from awardees submitted to COOL4Ed.
September 1, 2017	COOL4Ed, in consultation with ICAS, will submit report to CA Legislature
October 2017	COOL4Ed publishes updates of the awardee's abstract of narrative proposals on website along with actual savings produced by campus plans
	2018
June 30, 2018	Progress reports from awardees submitted to COOL4Ed.
June 30, 2018	Campuses may submit bonus funding applications equal to the amount of the initial funding (if funding is available)
July-August 2018	CA-OERC reviews applications and recommends initial project funding to CSU Chancellor
September 1, 2018	COOL4Ed, in consultation with ICAS, will submit report to CA Legislature
September 30, 2018	CSU Chancellor announces awards and transfers funding to campuses
October 2018	COOL4Ed publishes updates of the awardee's abstract of narrative proposals on website along with actual savings produced by campus plans
	2019
June 30, 2019	Progress reports from awardees submitted to COOL4Ed.

September 1, 2019	COOL4Ed, in consultation with ICAS, will submit report to CA Legislature
October 2019	COOL4Ed publishes updates of the awardee's abstract of narrative proposals on website along with actual savings produced by campus plans
2020	
June 30, 2020	Progress reports from awardees submitted to COOL4Ed.
September 1, 2020	COOL4Ed, in consultation with ICAS, will submit report to CA Legislature
October 2020	COOL4Ed publishes updates of the awardee's abstract of narrative proposals on website along with actual savings produced by campus plans

3.0 RFP to Open Educational Resources Adoption Incentive Program

Our goal is to produce the maximum amount of savings for students attending California Community Colleges and the California State University by supporting the maximum number of campuses acquiring the maximum amount of funding for their textbook affordability programs. The RFP is designed to define the funding requirements clearly, provide the rubric by which the proposals will be evaluated, guidelines and checklists to help campuses develop successful proposals, and provide flexibility in the ways campuses can satisfy the requirements so each campus can implement their program within their own campus culture, organization, and sustaining resources.

3.1 Requirements for Funding Your Proposal:

Your proposal will be composed of 4 major sections.

1. Textbook Affordability Academic Senate Resolution
2. Proposal Narrative for Textbook Affordability Plan Approved by Campus Academic Senate
3. Campus Coordinator Commitment
4. List of courses and predicted savings per course

Your local academic senate of a campus of the California State University or the California Community Colleges provides the important leadership and approvals in RFP process. Your campus academic senate will be required to:

- "Adopt a local campus resolution to increase student access to high-quality open educational resources and reduce the cost of textbooks and supplies for students in course sections for which open educational resources are to be adopted to accomplish cost savings for students.
- Approve a plan, in collaboration with students and campus administration, which describes evidence of the faculty's commitment and readiness to effectively use incentive funds to support faculty adoption of open educational resources."

There will be 1 proposal per campus and your proposal will be submitted online. The online submission process will involve submitting information into an online form and uploading documents addressing the following information:

1. Project Title
2. Campus Coordinator's Contact Information
3. Committed Campus Coordinator
4. Brief Project Description (100-300 words)
5. Projected Savings (required) for selected courses

6. Campus Plan Narrative (limit 5000 words) (upload)*
7. Funding requested/ Proposal budget
8. Copy of Approved Campus Academic Senate Resolution

The following sections of the RFP will define and explain the requirements more fully and will reference resources to support campuses successfully satisfying the requirements in their proposals. As frequently as possible, we have directly referenced language from the legislation in defining the requirements.

3.2 Required Academic Senate Resolution

Your local academic senate of a campus of the California State University or the California Community Colleges will need to pass a resolution to:

"Increase student access to high-quality open educational resources and reduce the cost of textbooks and supplies for students in course sections for which open educational resources are to be adopted to accomplish cost savings for students."

Your campus resolution is not required to include additional declarations. If your campus chooses to expand and/or elaborate the resolution, it is welcome to do so. Furthermore, the exact language for the resolution contained in AB 798 is not required. The California OER Council who will be evaluating the proposals will determine if your local campus resolution achieves the same intent as the AB 798 language.

Examples of language for the Academic Senate resolution at satisfy the requirements and are approved by the California OER Council are available at:

- Sacramento State University's AB 798 Academic Senate Resolution, 12/3/15 (http://www.csus.edu /acse/Senate-Info/15-16Agendas-Minutes/120315Agendas-Minutes/15-16FS-85.pdf)
- CA Community College Academic Senate sample pending

We encourage campuses to begin work on this resolution immediately. A proposal will not be considered without the Academic Senate's approved resolution.

3.3 Requirements for Campus Textbook Affordability Plans

To help campuses develop successful campus plan funded by AB 798, we have highlighted sections of the legislation that specifies requirements for campus plans. AB 798 states:

"The plan shall include the number of academic departments expected to be involved in the plan's implementation, the number of course sections in which open educational resources will be adopted, the percentage of cost savings for students anticipated on account of the adoption of open educational resources for each of these course sections, the ways existing faculty development programs will be enhanced by the plan's implementation, and the mechanisms that will be used to distribute adopted open educational resources to students."

"The plan shall describe how the campus will provide access to open educational resource materials for students, including how the campus will make hard copies of these materials available for students who lack access to these materials off campus and make it possible for students with such access to print hard copies."

"The plan may detail technological or staff support to increase the adoption of open educational resources. The plan shall describe how the faculty will learn about the California Open Online Library for Education (http://coolfored.org) and other existing open educational resources."

"[The] plan… describes evidence of the faculty's commitment and readiness to effectively use grant funds to support faculty adoption of open educational resources."

"The plan will identify the amount of the grant requested. The amount of the grant requested shall be equal to, or less than, the number of course sections in which both open educational resources will be adopted and cost savings for the course section will be greater than 30 percent, multiplied by one thousand dollars ($1,000). The

amount requested shall not be greater than fifty thousand dollars ($50,000). A plan shall commit to achieving greater than 30 percent cost savings in at least 10 course sections."

The RFP requires a narrative describing your plans for your campus textbook affordability program and the narrative should include the following topics:

- Campus activities to support faculty adoption of free and open educational resources for their courses
- Campus and faculty commitment and readiness to implement and sustain their textbook affordability program
- Identification, roles and responsibilities of your Textbook Affordability Campus Coordinator who will coordinate your textbook affordability program, including ensuring the programs are implementing in a timely and effective manner and providing reports and evaluations on the campus program's outcomes.
- Campus projections of cost savings for students and the methodology used to validate the actual savings by students

The CA-OERC will conduct a series of webinars and regional meetings to assist any CCC or CSU campus interested in submitting a proposal for AB 798 funding. The calendar of webinars and regional meetings will be published online along with a wealth of tools, resources, guidelines, examples, and recommendations posted on the COOL4Ed website. The COOL4Ed (http://coolfored.org) website provides quality assurance reviews by faculty from the California Community Colleges, the California State University, and the University of California to help inform faculty considering adoption of the free and open resources. Showcases of faculty who already adopted the free and open educational resources across a variety of disciplines is also available on the COOL4Ed (http://coolfored.org) website.

The CA-OERC members will hold office hours, review drafts, and provide guidance April-June 2016, all for free, to provide campuses support for submitting successful proposals.

3.4 Campus and Faculty Commitment and Readiness

The 136 campuses that make up the collective California Community Colleges and the California State University represent a wide variety of institutional and faculty cultures, organizations, sizes, priorities, histories, capacities in technology and faculty development services, funding, student populations, and much more. Consequently, the ways that campuses and faculty can demonstrate their commitment and readiness to implement their textbook affordability program will be varied.

Campus plans can be composed of a range of services and should represent the commitment and readiness of the campus and faculty to success. The table below provides some categories for services that you can include in your narrative for your campus plan.

- Each service might need a different strategy for your faculty and your students.
- Briefly describe your campus's relevant, existing faculty development programs (e.g. Centers for Teaching Excellence, Affordable Learning Initiatives, Equity Plans, etc.). Explain how these existing programs will be enhanced by the plan's implementation.
- The implementation of AB 798 by CCC and CSU campuses is intended to enable the continued use of free and low-cost OER materials beyond the lifetime of the funding. Please provide a brief description of the sustainability and expansion of your proposed plans beyond the courses identified in your proposal.
- Describe the campus stakeholders involved in the campus plan (e.g., Librarians, Directors of Academic Technology, Distance Education Coordinators, Disabled Students Services, Associated Students, Academic Senates, Faculty Development Directors, etc.). These stakeholders can be important participants in sustaining and expanding your campus' textbook affordability program.

If your campus has already implemented some type of textbook affordability program, we encourage you to include a description of your program and how you plan to leverage the existing program to support the goals of your proposed activities.

We will provide examples of how your campus might implement these services at the COOL4Ed website. These

examples are meant to help you identify ways that you can integrate your textbook affordability plan into your existing campus services.

Types of Services To Support Implementation of Your Campus' Textbook Affordability Program	Services for Faculty & Staff	Services for Students
1. Communications and Outreach: How will the campus and faculty communicate about the textbook affordability program and encourage participation?		
2. Training and Professional Development: How will the campus provide and support participation in the training and professional development appropriate for your campus to implement your textbook affordability program?		
3. Help and Support Services: How will the campus and faculty help answer questions, help access to the free and open educational resources, help resolve issues, and provide other help and support during the implementation of your textbook affordability program?		
4. Providing Print Copies: How will the campus and faculty provide print copies (at a reasonable price if necessary) of the free and open educational resources as part of the implementation of your textbook affordability program?		
5. Library/Discovery/Curation Services: How will your campus and faculty support faculty finding and choosing free and open educational resources that they can adopt in their courses for your textbook affordability program? Will your campus curate the collection of free and open educational resources?		
6. Technology Services: How will your campus and faculty use technologies to provide access to the free and open educational resources?		
7. Campus Coordination: How will your campus coordinate the administration of funding, training & professional development, help and support services, library services, technology services, and program evaluation and reporting of your textbook affordability program?		

3.5 Acceptable Campus Activities for Campus Plans

Campus plans to achieve the goals of the Open Educational Resources Adoption Incentive Program shall include some combination of some or all of the following activities:

1. Faculty professional development, which can include promoting awareness, education, and outreach of OER materials and learning about OER collections, including the California Open Online Library for Education (www.cool4ed.org), campus library, and other sources (e.g. www.merlot.org, etc.).
2. Professional development for staff whose work supports providing students with open educational resources, including (where appropriate) librarians, academic technology and tech support staff, and others.

3. Open educational resource curation activities, this can include campus library efforts, procedures for selecting and recommending OER, the creation of online catalogues and lists, and other similar activities.
4. Curriculum modification and requisite release time for faculty to support adoption of open educational resources.
5. Support for Campus Coordinator. (No more than 30% of the award may be applied.)
6. Technology support for faculty, students, and staff whose work furthers the goals specified in a campus' approved plan to accelerate adoption of OER materials.

Funds from the Campus Open Educational Resources Adoption Incentive Program can NOT be used to support the following:

1. Direct compensation for faculty members who adopt open educational resources, except as provided to compensate for professional development.
2. The development of MOOC's or online courses that include non-matriculated students.
3. The creation of new OER materials.
4. The purchase of new equipment.
5. Past curricular conversions to OER materials.

The description of your campus activities must include an estimated timeline for implementation of the plan September 2016 through May 2017 as well as assessment strategies about the adoption, implementation, distribution, and use of OER materials by both faculty and students.

The campus academic senate's approval of the campus plan need not be a formal resolution. Evidence of approval by the campus academic senate can be a memo from the campus' academic senate chair to the California OER Council stating the campus academic senate's approval of the plan. A proposal will not be considered without the Academic Senate's approval of the plan.

Campuses are welcome to use technical assistance of their choosing to support their development and implementation of their textbook affordability program. The CCC and the CSU are encouraged to provide such technical assistance to their campuses.

As noted earlier, COOL4Ed and CA OER Council will provide free access to webinars about developing your proposal and implementing your program. The CA-OERC members will hold office hours, review drafts, and provide guidance April-June 2016, all for free, to provide campuses support for submitting successful proposals.

3.6 Campus Coordinators

Implementing your campus' textbook affordability program will require (1) the coordination of activities for faculty, staff, and students, (2) the allocation and accountability of award funding, and (3) the evaluation of the program to be reported to the California Open Online Library, who in coordination with the Intersegmental Committee of the Academic Senates will need to annually report to the California Legislature before September 1 of each year. The RFP will require proposals to include a Textbook Affordability Campus Coordinator (TACC) to perform these critical tasks. There will be a few requirements for the TACC's responsibilities and additional recommendations provided by the CA OER Council.

Your proposed budget can include compensation for your campus coordinator and/or these responsibilities can be blended into an existing position. Campus proposals can also include budget for technical assistance. It will be up to each campus to decide how best to implement their TACC so it aligns with their program goals, campus culture and policies, and campus capabilities.

3.7 Requirements for Your Textbook Affordability Campus Coordinator:

1. Be the contact and communication representative for the campus related activities including
   1. submitting campus proposal
   2. participating in activities (e.g. webinars with CA OER Council, conference calls, convenings, etc.) that support textbook affordability programs

3. responding to inquiries concerning your campus textbook affordability program

2. Responsible for the receipt and allocation of funding to campus budgets in accordance with the award and campus policies

3. Provide annual reports to the California Open Online Library for Education beginning June 30, 2017 to June 30, 2020. COOL4Ed will provide the format and information requirements for the reports.

3.8 CA OER Council Recommendations for Your Textbook Affordability Campus Coordinator:

- The TACC should be a full-time faculty, librarian, or other appropriate full-time staff and is expected to be available to serve for the entire duration of the project (August 2016- Sept 2020).
- The TACC should be endorsed by the local campus Academic Senates or appropriate governance bodies. An ideal TACC would meet the following qualifications:
  - Have some experience with or knowledge of free and open educational resources, etextbooks and materials.
  - Have some basic understanding of OER issues (copyright, licensing, sources of OER textbooks and materials, technical issues, etc.).
  - Have knowledge of campus administrative and governance structure and of local curricula.
- Be able to forge relationships with potential partners on campus (e.g., library, bookstore)
- In preparation of the proposal, the TACC needs to identify faculty members who are willing to offer their classes to the OER adoption initiative and assess the financial impact that each course may have.
- The TACC may need to create a campus committee for consultation on plans and policy as well as convene a campus task-force to support OER adoption. (The taskforce may, for instance, consist of a librarian who assists with the identification of OER material, technical support staff who ensures student access to digital textbooks, and bookstore staff who stocks optional low-cost hardcopies for sale.)
- The TACC is strongly encouraged to organize faculty workshops and perform outreach about low cost textbooks and OER on campus. TACC should also actively communicate with and share resources with CCs on other campuses. CCs names, campus affiliations, participating faculty, and project proposal will be published on COOL4Ed.

4.0 Campus Plan for Cost Savings for Students

Your proposal will have to include how your campus plans to produce the student savings at levels required to receive funding. Each campus may submit one proposed plan with a minimum request of $10,000 and a maximum request of $50,000 to implement the campus plan. As stated in AB 798:

The plan will identify the amount of the funding requested according to the funding rules. State legislation (AB 798 "Bonilla") requires that every Open Educational Resources Adoption Incentive Program achieve a minimum of 30 percent in cost savings to students in at least 10 course sections. The amount of the grant requested shall be equal to, or less than, the number of course sections in which both open educational resources will be adopted and cost savings for the course section will be greater than 30 percent, multiplied by one thousand dollars ($1,000). The amount requested shall not be greater than fifty thousand dollars ($50,000). A plan shall commit to achieving greater than 30 percent cost savings in at least 10 course sections. (Previous conversions are not eligible.)

4.1 AT LEAST ONE (1) OER (as defined within AB 798) MUST BE USED AS A SUBSTITUTE FOR EXISTING COURSE MATERIALS.

If your campus identifies 10 sections that will use free and open educational resources, and the plan expect that the cost savings will be greater than 30%for each of those sections, then the campus can apply for the minimum amount of $10,000.

If your campus identifies 20 sections that will use free and open educational resources, and the plan expect that

the cost savings will be greater than 30%for each of those sections, then the campus can apply for $20,000.

If your campus identifies 35 sections that will use free and open educational resources, and the plan expect that the cost savings will be greater than 30%for each of those sections, then the campus can apply for $35,000.

If your campus identifies 42 sections that will use free and open educational resources, and the plan expect that the cost savings will be greater than 30%for each of those sections, then the campus can apply for $42,000.

If your campus identifies 50 sections that will use free and open educational resources, and the plan expect that the cost savings will be greater than 30%for each of those sections, then the campus can apply for maximum of $50,000.

4.2 The RFP will require your proposal to specify the following information within the online submission process.

1. The number and titles of academic departments expected to be involved in the plan's implementation
2. The name of the expected courses participating in the program
3. The number of course sections for each course involved in the program in which open educational resources will be adopted
4. The estimated enrollment cap/target/limit for each course section involved in the program
5. The term when the free and open educational resources will begin being adopted (Fall 2016 or Spring 2017).
6. The estimated percentage of cost savings for students anticipated on account of the adoption of open educational resources for each of these course sections.
7. Calculate the anticipated cost savings through OER adoption for each of these course sections in the following manner:

Course Name	Course Section	Total Cost of Course Materials in Immediately Preceding Term	Total Cost of Course Materials OER Term Cost	Projected savings in dollars per student	Projected % saving	Meet AB 798 Requirement? (Savings must be greater than 30%)
		A	B	(A-B)	((A-B) / A)*100	
Statistics 200	Section 1	$120 ($90 textbook+ $30 workbook)	$0 Free etextbook with workbook	$120	=(120/120)*100 =**100%**	Yes
	Section 2	$120 $90 textbook + $30 workbook	$30 Free etextbook + $30 workbook	$90	= (90/120)*100 = **75%**	Yes
	Section 3	$40 $30 textbook + $10 workbook	$30 $30 textbook + FREE workbook	$10	=(10/40)*100 = **25%**	No

Not all sections of a course need to participate in your textbook affordability program. The courses participating in your textbook affordability program must be college credit courses funded by state funds (vs. self-support programs).

5.0 Required Reporting

You must complete and submit the AB 798 RFP spreadsheet (docs/AB 798 Projected Cost Savings and Progress Report Template.xlsx) which asks you to describe the courses that will be adopting the OER to reduce the cost of course materials at least 30%. Please upload the spreadsheet as part of your campus plan.

This spreadsheet will be used to create an initial public reports that will be posted on the COOL4Ed website (October 2016). You will need to complete and upload the Progress Report spreadsheet which will be used to create the reports to the California legislature and the California Department of Finance (October 2017, 2018, 2019, 2020) as well as publish on the COOL4Ed website. The Progress Report spreadsheet [make link to spreadsheet/template] provides you good guidance on the information you are required to report if you are granted and accept the award. We understand that there will be times when the courses you proposed for adoption of OER will need to be changed. These changes will be acceptable IF the savings per section is 30% or greater. The Progress Report spreadsheet (docs/AB 798 Projected Cost Savings and Progress Report Template.xlsx) will enable you to identify the changes in the courses as well as include additional courses that replace fee-based materials with OER materials that were not explicated planned.

Our goal is to make the reporting process as simple as possible AND design the report you provide to COOL4Ed so it can be easily used to promote the success of your textbook affordability programs at your own campus.

5.1 Funding Requirements:

"Moneys appropriated in subdivision (f) of Section 69999.6 for the program shall not be used for direct compensation for faculty members who adopt open educational resources, except as provided to compensate for professional development pursuant to subparagraph (A) of paragraph (1), or for purchasing new equipment."

5.2 Funding Limits and Process

- A maximum of 100 proposals will be funded according to AB 798. Feedback will be provided to those proposals not funded.
- If the total amount requested in proposals does not exceed $2,000,000, the California Open Education Resources Council shall make grants for each approved application equal to the amount requested in the application.
- If the total amount requested in proposals exceeds $2,000,000, the CA-OERC Review Committee shall make grants for the full amount requested in approved applications on a competitive basis based on the strength of the evidence provided of faculty commitment to the adoption of open educational resources.
- Proposals submitted after the June 30, 2016 due date will not be considered for this round of funding.
- Disbursements from the Campus Open Educational Resources Adoption Incentive Program are incentive awards and not grants from state funds. No indirect costs are to be included in the budgets.
- Campus Open Educational Resources Adoption Incentive Program awards for the California Community Colleges will be transferred to the CCC Chancellor's Office from the CSU Office of the Chancellor for distribution to CCC campuses following CCC policies and procedures.
- Campus Open Educational Resources Adoption Incentive Program awards for the California State University will be distributed to CSU campuses following CSU policies and procedures by the CSU Office of the Chancellor.

6.0 Proposal Review Process

Members of the California OER Council will become members of the CA-OERC AB 798 RFP Review Committee. The CA-OERC AB 798 RFP Review Committee will be comprised of at least one member each from the CCC, CSU, and UC according to the mandated make-up of the CA-OERC. The CA-OERC Chair will administer the review process but will not have a vote.

The CA-OERC AB 798 RFP Review Committee Members will use the publically available evaluation rubric (see below) to review and evaluate each proposal submitted. CA-OERC AB 798 RFP Review Committee members will calibrate their understanding and application of rubric criteria. CA-OERC AB 798 RFP Review Committee members cannot review a proposal from his/her campus. When a campus where a reviewer resides is discussed, they will recuse themselves from the review and evaluation process. Each proposal will be reviewed and evaluated by one CA-OERC AB 798 RFP Review Committee member from each of the three systems.

6.1 Bonus Funding

In the event that the $3,000,000 funding for AB 798 has not been exhausted by the first round of requests, and if a campus has been successful in its initial plan, completed the final report, and submitted the e-portfolio project(s), a campus may apply for bonus funding equal to the amount of its initial funding. The application shall include evidence that the campus has met or exceeded total cost savings of greater than 30 percent for the required number of course sections specified in the approved plan for the campus' initial funding in the 2016–17 academic year

- A campus may also compute the total cost savings for each course section and include that figure in its application for bonus funding.
- The total cost savings for each course section shall be the number of students enrolled in a course section multiplied by the per-student decrease in the costs of books and supplies for the course section in the term resulting from the adoption of open educational resources.

Bonus funding specified above shall be used to further the goals of the campus' approved plan for its initial funding. It is the intent of the Legislature that bonus funding support each campus' adoption of open educational resources for at least double the number of course sections, and with at least 30 percent cost savings for each of these course sections, as accomplished by the campus' approved plan for its initial funding.

7.0 AB 798 RFP Rubric

(Cick for PDF version (docs/AB_798_RFP_Rubric.pdf))
The rubric below is composed of 2 sets of criteria. The first set of criteria (Questions 1-7) reflect requirements that proposal must meet (all are required) to be eligible for an award. The second set of criteria (Questions 8-16) reflect dimensions that proposals can vary in their capabilities and abilities to deliver on the goals of their textbook affordability program.

7.1 Criteria required to be eligible for funding:

1. The proposal has included their campus academic senate resolution that meets the requirements of AB 798.
   a) YES
   b) NO

2. The proposal has included a plan for their AB 798 textbook affordability program that was approved by the campus academic senate.
   a) YES
   b) NO

3. All the courses included in the campus' plan for their AB 798 textbook affordable program will be

implemented in the fall 2016 and/or spring 2017.
a) YES
b) NO

4. All the course sections included in the campus plan for their AB 798 textbook affordability program will have an estimated savings to students of 30% or more.
a) YES
b) NO

5. All the course materials being adopted by faculty and used by students in the campus' AB 798 textbook affordability plan meet the requirements for being **free and** with a public domain license **or** a Creative Commons license **or** a legal license for acceptable use by faculty and student.
a) YES
b) NO

6. The campus plan includes a Textbook Affordability Campus Coordinator assigned to fulfill the required activities.
a) YES
b) NO

7. The proposal describes how the campus will provide access to open educational resource materials for students, including how the campus will make hard copies of these materials available for students who lack access to these materials off campus and make it possible for students with such access to print hard copies.
a) YES
b) NO

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

7.2 Criteria to evaluate the relative quality of the campus proposal

8. The proposal for the campus coordinator meets the requirements in the RFP and addresses the recommendations of the California OER Council
4- Meets all requirements, leverages existing organizations, and addresses many recommendations
3- Meets all requirements and addresses many recommendations
2- Meets all requirements and addresses a few recommendations
1- Meets all requirements and not address recommendations

9. Proposed activities are reasonable and well-planned, with a high likelihood of achieving the intended outcomes
4 – The proposal is very well-crafted, with a clear description of reasonable activities, a practical timeline, and achievable objectives.
3 – The proposal has a description of reasonable activities, a practical timeline, and achievable objectives.
2 – The proposal has a description of activities, a timeline, and objectives, but one or more parts of the plan are vague or questionable.
1 – The project plans are hard to understand, vague, and/or unreasonable.

10. Proposed services to support faculty and student participation in the campus's Textbook Affordability Program are comprehensive, aligned with campus culture and resources, and supportive of the goals for the campus plan

4 – The proposed services are inclusive of all the types of services supportive of a textbook affordability program as outlined in the RFP, effectively leverages existing services, and are targeted to the needs of faculty and students.

3 – The proposed services are inclusive of at least 5 types of services supportive of a textbook affordability program as outlined in the RFP, partially leverages existing services, and are targeted to the needs of faculty and students.

2 – The proposed services are inclusive of no more than 3 types of services supportive of a textbook affordability program as outlined in the RFP, do not leverage existing services, and it is unclear how they are aligned with the needs of faculty and students.

1 – The proposed services are not articulated affordability program as outlined in the RFP, does not leverage existing services, and not aligned with the needs of faculty and students.

11. Scope of impact on cost savings, course sections, number of faculty, students or staff.
 4 – Description of cost savings and impact to campus is well supported to have a highly significant impact.
 3 – Description of cost savings and impact to campus is well supported to have a significant impact.
 2 – Description of cost saving and impact to campus is smaller in scale but still meets the 30% cost savings requirement.
 1 – Description of cost savings and impact to campus is unclear but still meets the 30% cost savings requirement.

12. How materials/practices are disseminated to students/stakeholders.
 4 – Project plan describes how the benefit of OER practices, processes and/or materials OER will be distributed to students and/or stakeholders in a reasonable, achievable way.
 3 – Project plan describes good practice and processes for OER distribution.
 2 – Project plan describes good practice for OER distribution.
 1 – Project plan is weak in its description of support for distribution of processes, practices and mechanisms.

13. Budget is reasonable, and justification is provided for each item
 4 – Plan is accurately budgeted and a strong justification for its utility is given.
 3 – Plan is accurately budgeted and justification for its utility is given.
 2 – Rationale for budget shows moderate support for plan.
 1 – Request is not clear or reasonable.

14. Project is sustainable
 4 – Project has a strong campus support/interest; there is a strong possibility of developing an OER culture on campus that is sustainable in multiple areas and across multiple disciplines.
 3 – Project has some campus support/interest; there is a good possibility of developing an OER culture on campus that is sustainable in some areas or across multiple disciplines.
 2 – Project has limited campus support/interest; there is a limited possibility of developing an OER culture on campus that is sustainable.
 1 – No indication that practices from the proposal will be ongoing.

15. The plan for reporting on the outcomes of the campus' textbook affordability program are comprehensive and should be effectively and reliability implemented
 4 – The reporting is assigned to an organization and personnel with the expertise, resources, and a sustainable interest to collect and report on the success of the program for the next 4 years.
 3 – The reporting is assigned to a reasonable organization and personnel, with a sustainable interest to collect and report on the success of the program for the next 4 years.

2 – Rationale for budget shows moderate support for plan.

1 – Request is not clear or reasonable

Total: 32 points maximum score

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