

# **Report of the Joint Task Force on Textbook and Reader Affordability**

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**University of California, Berkeley  
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## **Executive Summary and Key Recommendations**

The Joint Task Force on Textbook and Reader Affordability was formed in Spring 2009 to look at ways to reduce the costs of course materials for Berkeley students. The Task Force examined current campus processes regarding textbook selection and adoption; reader production and costs; disability access; and instructor and student behaviors, identifying the areas that impact ultimate cost for students. From extensive conversations with relevant constituencies (listed in Appendix A) and review of the almost-daily new developments nationally, the Task Force identified a comprehensive set of issues at the national, state, and campus level that impact textbook cost and mapped out the new directions in federal and state legislation, technology, copyright protections, publishers' models, and campus resources (such as the Library) that create a dynamic landscape regarding textbook prices. The Task Force concluded that there is no one means to reduce textbook and reader costs for students, but recommended a number of initiatives to better educate students and faculty, preserve individual choices, and maximize affordability for required course materials.

The Task Force presents the following recommendations for next steps. Guiding principles in shaping these recommendations include recognizing that there is no "one size fits all" solution to the complicated topic of textbook affordability, assuring that students have maximum choices in where and what format to purchase textbooks, recognizing faculty autonomy in making decisions about course materials, and seeking standardization and strategic vendoring when possible to keep prices affordable.

1. Leverage the purchasing power of the University to aggressively reduce the costs of new textbooks by lowering the markup between publishers' price and retail price and/or by lowering the publisher's price itself.
2. Leverage the purchasing power of the University to aggressively work with publishers on issues of accessibility for students with disabilities.
3. Create and implement a comprehensive marketing and educational strategy for students and faculty about issues of textbook affordability.
4. Re-engineer the book ordering process to encourage more timely submissions and earlier indications of whether the same textbook will be used the next time the course is offered.
5. Develop policies regarding faculty who require their own textbooks for courses they teach.
6. Carefully monitor the implementation of federal and state legislation regarding textbook affordability to make sure the campus is in compliance.
7. Keep abreast of new developments in technology and existing campus systems such as bSpace and Kuali that intersect with textbooks and readers.
8. Expand the Library's e-Readings program, and better educate faculty about copyright

issues and costs of readers.

9. Support the use and development of open educational resources by faculty through increased awareness of existing resources and encouragement to create new materials.
10. Create a faculty/student textbook and course readers standing committee to address affordability issues and new technologies as they emerge.

## **Work of the Task Force**

### **Need for a Task Force**

National concern has been building over the high cost of course materials such as textbooks and readers for college students. Various studies have shown that college students nationally pay on average \$800-1000 per year for textbooks.<sup>1</sup> More alarming is the rate at which textbook costs are rising. Over the last two decades, textbook prices have increased by 186% as compared to 72% for inflation.<sup>2</sup> The General Accounting Office reported that between 1987 and 2005, textbook prices increased on average 6% a year.<sup>3</sup>

Numerous articles in the national media have appeared over the past few years outlining the issues and various ways to keep course materials affordable. As technology and business models for the publishing industry rapidly change, a number of initiatives, ranging from new regulations to textbook rental programs to free open content textbooks, have been introduced.

### **Formation of the Task Force**

In recognition of this dynamic climate and the mounting costs of higher education, former Academic Senate Chair Mary Firestone and former Vice Provost for Undergraduate Education Christina Maslach called for the creation of a Joint Task Force on Textbook and Reader Affordability to convene in Spring 2009 to investigate this issue as it relates to Berkeley students. This is the final report of that Task Force.

This Joint Task Force on Textbook and Reader Affordability (called Textbook Affordability Task Force) is an outgrowth of the 2008 California Bureau of State Audits report<sup>4</sup> that found significant increases in textbook prices. Moreover, the BSA reported a lack of awareness on the part of faculty about state laws encouraging them to participate in efforts to reduce the costs of course materials. UC Berkeley was the focus of a site visit as part of the audit, and members of the audit team met with campus faculty, students, and administrators in the preparation of the BSA report.

In his letter of May 28, 2008 regarding the Academic Senate's responsibilities under Section 66406 of the Education Code, former Academic Senate Chair Bill Drummond noted that the Divisional Council felt that more data were needed to understand textbook usage and pricing on this campus and to be able to develop effective strategies to hold down the cost of textbooks. As a result a Task Force was convened.

The Textbook Affordability Task Force was co-chaired by the Academic Senate Student Affairs Committee Chair Dennis Lieu (Professor, Mechanical Engineering) and Assistant Vice Chancellor for Equity and Inclusion Barbara Gross Davis. The membership of the group included faculty, students, and administrators (see roster in Appendix B). The Task Force created a public website that describes its work and contains resources about textbook affordability (<http://teaching.berkeley.edu/textbooks>).

## **Charge of the Task Force**

The charge to the Task Force was to

- review data related to course materials (textbooks, course packs, ancillary materials) and reader usage and pricing to better understand the complex issues surrounding affordability.
- examine issues involved in selection and adoption of course materials, including costs, use of new editions, and alternative formats for students with disabilities.
- explore financial issues around course materials from the perspectives of different stakeholders: faculty as textbook authors, campus bookstore revenues, students as consumers who need the lowest prices possible, and the Library as provider of licensed content.
- identify actions that students, faculty, and the campus can take to lower textbook and reader costs.
- investigate the efficacy of providing online textbooks and digital course readers.

## **Process of the Task Force**

As the Task Force began its work, it found that nationally the rate of change in the area of textbook publishing, e-books, e-readers, disability access, and the like was increasing exponentially. In response, the Task Force increased its original membership over time, drawing in interested campus constituencies, and expanded the topics it examined through guest interviews (see Appendix A for persons interviewed by the Task Force). The Task Force also researched factors that lead to high textbook prices, including the practices of commercial publishers; reviewed how faculty select and order textbooks; examined the bookstore ordering and pricing policies; identified alternatives to new textbooks (such as used books, book rental programs, and the like); and considered how current and upcoming technology could impact the costs of textbooks.

**Please note that this report reflects the state of new technology as of June 1, 2010. Because changes in such areas as e-books are announced in the media frequently, this report will not reflect industry developments after that date.**

## **Current Campus Processes**

Below is information about textbook and reader pricing and processes compiled by the Task Force during its interviews and information gathering.

### **Instructors**

Faculty have discretion in selecting textbooks, readers, and course materials for their classes in terms of content and format. Overall, instructors use a combination of bound print copies

(hardbound and paperback), unbound print copies, and electronic versions (commercially available, Library-licensed, self-digitized, and open content) of textbooks and course packs. For some courses (e.g., large-enrollment lower-division courses in math and biology), faculty collaboratively select a common textbook and format. While instructors are strongly encouraged to submit their book orders to the campus bookstore, some faculty choose to list only with specific bookstores (such as local independent bookstores) and/or with Amazon.

## Textbooks

**Bookstores.** The Cal Student Store is run by Follett, a corporation that manages 860 college bookstores across the country. The store is one of the commercial enterprises of the ASUC Auxiliary (located in the Division of Administration) and is overseen, along with the other ASUC commercial enterprises, by the Store Operations Board comprising ASUC and Graduate Assembly representatives, faculty, and administrators. A predetermined portion of the profits from the bookstore (and other commercial enterprises) are returned to the ASUC student government and used to fund student groups on campus. Over the past twelve years, Follett has provided an average of \$1.8M per year to the ASUC (by contract the minimum yearly payment is \$1.75M).

The Cal Student Store's primary brick-and-mortar competitor near campus is Ned's Bookstore. Formerly part of a small chain of stores, Ned's is now managed by the Nebraska Book Company which runs 277 college bookstores across the country.

The Boalt School of Law has an exclusive contract with Ned's for an on-site bookstore for law textbooks.

**Textbook order submission process through the Cal Student Store.** Faculty submit their book lists either directly to the Cal Student Store or to a departmental staff member who collects the lists and submits them to the store. The Cal Student Store compiles the orders (which may or may not include ISBNs from the departments), does any additional research as needed in conjunction with the departments, and orders books, starting with used books and then ordering as many new books as necessary. Ned's receives some of its book lists through the Cal Student Store and some from faculty directly. Neither bookstore alone nor both stores together orders enough books to accommodate the full course enrollment for every class on campus. They each have established formulas that specify the number of books to stock, based on sales history of the course while taking into account new editions, new course, new requirements.

**Adoption deadlines for the Cal Student Store.** Adoption deadlines are October 15 for the Spring semester and April 15 for the Fall semester. These deadlines are set approximately one month prior to student buyback during finals. This allows the Cal Student Store to pay students the highest price possible when they sell their books back, assuming the title will be used in the coming semester. However, "adoption rates" by faculty vary by department, faculty member, and by class, and are traditionally low: for example, 7.6% of titles had been received by October 15, 2008 for the Spring 2009 semester, and 16.72% of titles had been received by April 21, 2009 for the Fall 2009 semester. (Adoption rates for the past four semesters though Spring 2010 are included as Appendix C.) These deadlines are set in order to give bookstores time to do

the necessary research on what versions to buy and to locate used books which can be a better value for students. Faculty report anecdotally that the deadlines are too early for course planning for the following semester and that the current book ordering processes can be difficult to work with, while students report sometimes book lists aren't available in time to do comparison shopping.

Currently, faculty are encouraged to meet adoption deadlines through a CalMessage once a semester, direct contact of some faculty by a cadre of volunteer students, and efforts by the Cal Student Store, including postcards to faculty and a lunch for departmental staff each semester. In addition, the Task Force has placed reminder notices on bSpace, posted deadlines on the Textbook Task Force website, and distributed flyers (see Appendix D for an example of a flyer).

**Textbook sales and pricing.** The Cal Student Store reports that it currently sells more new than used books: 7 out of 10 textbooks sold are new; used books generally sell out before new books. Low textbook adoption rates by store deadlines are the reason that more used books are not available for students. In terms of e-textbooks, in Spring 2009 only about 100 titles were available in digital formats, a fraction of a percentage of books sold. The store marks up new books by 33% (creating a 25% margin). The store buys back used books from students, regardless of condition, at 50% of the purchase price (new or used) if the book is scheduled to be used in the following semester, or at a lower (wholesale) price if it is not listed for a class. The bookstore sells used books at 25% off the new book price. We understand that the profit margin on used books is higher than on new books, in part because of markdowns in used textbooks and high administrative handling costs.

Appendix E shows some examples of pricing for various formats for texts for large-enrollment introductory courses. Note that these tables assume that students will sell the book back at the end of the semester and the book is scheduled to be used in the coming semester. Students who keep the book for their reference library will incur the full cost in the second column. In general, the cost of buying an e-textbook is more than buying a new hard copy or used copy and selling it back to the bookstore (assuming the book will be used the following semester), but this requires more upfront expenditures. Rental can be cheaper than buying new print (and selling it back) or e-versions but more expensive than buying used print books (and selling them back). Several online sites search the web for the lowest priced copies of new and used textbooks, such as, dealoz.com, campusbooks.com, cheap-textbooks.com.

## **Course Reserves**

In addition, faculty often opt to put a copy of the course text or course pack on print reserve at a campus library, which allows students to gain consistent but limited access to a text over the course of a semester.

## **Readers**

Readers are handled in various ways on campus. Many faculty appear to compile hard-copy readers and submit them to Copy Central or other commercial copy centers for duplication and sale. Other faculty supplement printed readers or bypass print format entirely by making digital versions of texts (whether Library-licensed or personally digitized) available in their course-

based sites via the campus learning management system, bSpace. In the case of printed readers, Copy Central reportedly obtains copyright permissions as needed, and this cost is factored into the typically high cost of the reader itself. The Cal Student Store does not produce or sell readers but is exploring the feasibility of doing so; Odin (a local business) sells readers exclusively through Ned's by mutual agreement. The Haas School of Business uses electronic readers for its graduate program exclusively through the online company Study.Net.

When faculty incorporate online or digitized course materials such as journal articles and book chapters in bSpace or other course-related sites, they often opt to create PDF files or other files of printed material, which can raise copyright and fair use concerns depending on the scope, purpose, nature, and use of the work in question. When offering online readings, bypassing hard copies, faculty often are not aware of or do not take full advantage of pre-paid Library journal and e-book subscriptions which generally (although not inherently) include permission for articles to be included in online course readers. (Note that electronic journal licenses apply to use by Berkeley faculty, staff, and students, not for printing by a commercial entity such as Copy Central.) As evidenced by analysis of a number of syllabi in the Library's eReadings program, a typical article-focused reading list from any discipline can have anywhere from 25% to 75% of its course content readily available and accessible to students through Library interfaces—resources that are already purchased by university resources. If faculty were to regularly check Library subscriptions and provide links to these resources in bSpace course sites as an alternative means of access, the cost of printed readers might be significantly reduced. (Note that students incur printing costs that may be as much as five cents a page if they print out digitized articles.)

There is ongoing debate about whether students benefit from adequate interaction with digital texts versus printed texts, which can be seen as largely a matter of personal preference and choice. For example, in a 2008 Student PIRG survey, “only 33% of students said they were comfortable reading off a screen, and 60% said they would buy a low-cost printed textbook rather than using an electronic one for free.”<sup>5</sup> Further, some research indicates that students had lower reading comprehension of scrolling online material compared to print versions.<sup>6</sup>

## **Students**

Using national statistics that estimate students spend between \$800 and \$1000 per year on textbooks, Berkeley undergraduates as a whole could be spending approximately \$20-25 million on books annually. Students can purchase or rent their textbooks, readers, and other course materials wherever they wish (the Cal Student Store, Ned's, other brick-and-mortar stores, book swaps, and online) and in whatever format they wish, as available (hard copy, electronic). We do not have data on where students are actually obtaining their course materials, but anecdotally students are increasingly buying or renting their books online if they have enough time before the beginning of the semester to have the books shipped. The Task Force did not obtain data on UC Berkeley students' preference for print or digital texts. However, two informal polls provided interesting information. A Spring 2010 clicker survey of students in Professor Martha Olney's Econ 1 class revealed the following:

*Question: Where did you buy your Econ 1 textbook? (n = 585)*  
45% Cal Student Store (online or in the store)

20% Neds, or other brick-and-mortar store  
17% Online  
14% From a friend, or other  
4% I didn't buy the book

*Question: Ignoring price and focusing just on your preferences, what format would you most want to purchase as an Econ 1 textbook? (n = 585)*

75% Bound book (new or used)  
16% 3-hole punch book  
3% Electronic book (kindle or nook or equivalent)  
6% E-Book (for your laptop)  
0% None of the above

*Question: Taking price into account, what is your preferred format for an Econ 1 textbook? (n = 585)*

5% New: \$156.50 (buyback possible)  
31% Used: \$117.50 (buyback possible)  
4% E-book: \$80.00 (for laptop; 180 day license)  
40% Custom Loose Leaf: \$73.25  
19% Rent the bound book: \$70.42

An online student poll<sup>7</sup> conducted by the UC Berkeley Student Technology Council in late 2009 indicated that increased access to e-texts and digital course content ranked about the same as greater access to computer labs and printing among many respondents:

	N =	
Faster AirBears or more AirBears coverage	(98)	36%
More podcast and webcast courses	(57)	21%
e-Textbooks and digital course materials	(31)	11%
More access to computer labs and printing	(28)	10%
More green technology on campus	(16)	6%
Enhanced bSpace functionality	(21)	8%
<b>Total</b>	<b>(271)</b>	<b>100%</b>

### **Alternative Formats for Students with Disabilities**

Approximately 50-55 students require alternative formats for textbooks and readers because of a visual or other disability (note that this number generally increases by 3-4 per semester). The Assistive Technology Teaching and Learning Center (ATTLC, <http://attlc.berkeley.edu>) provides an array of services to assure equal access to course materials by converting a printed textbook to a format students can read. A majority of these students have learning disabilities that require special software (e.g., Wynn Wizard, Kurzweil 3000) that will automatically read text out loud to the student and highlight what is being read.

The ATTLC has created several core books and readers for frequently offered courses; often core

books are reused by as many as five or more students and used in multiple classes. However, the vast majority of books scanned are only used once and never accessed again. Some books are requested by partner universities and shared when appropriate. Depending on the format all or some sections of books may not be sharable, even with Berkeley students.

Course readers can take five to ten times longer to convert than textbooks as the quality of the reader texts is generally quite poor and the articles may need to be retyped in their entirety. This process would be improved by faculty using Library e-text licensing so students can use the text without any intervention. In a given semester, the ATTLC may convert 400-500 textbooks and readers for 200 courses.

The preferred process for converting course materials is for students to bring in their requests as soon as they have enrolled but at least 2-3 weeks before the semester starts so that the conversion can take place in a timely fashion. If students have early access to their texts the alternative media coordinator and assistive technology specialist can work with publishers and faculty to make the texts accessible for students. Unfortunately, for a variety of reasons, the preferred process does not always run smoothly. Students may not know their reading lists in advance of class (an argument for earlier adoptions), they may delay giving the text to the ATTLC until after the start of the semester, electronic versions of course materials are not necessarily readily available, some e-versions are difficult to make accessible, and so on. Many students do not buy their books until school starts or several weeks into the semester; some wait until they receive their financial aid to buy books. Some students do not even apply for services from the Disabled Students' Program until they are at risk academically, and may not be evaluated for their best fit until late in the semester. Faculty often do not have readers complied until the second or third week of class, and many will create a second or third volume later in the semester.

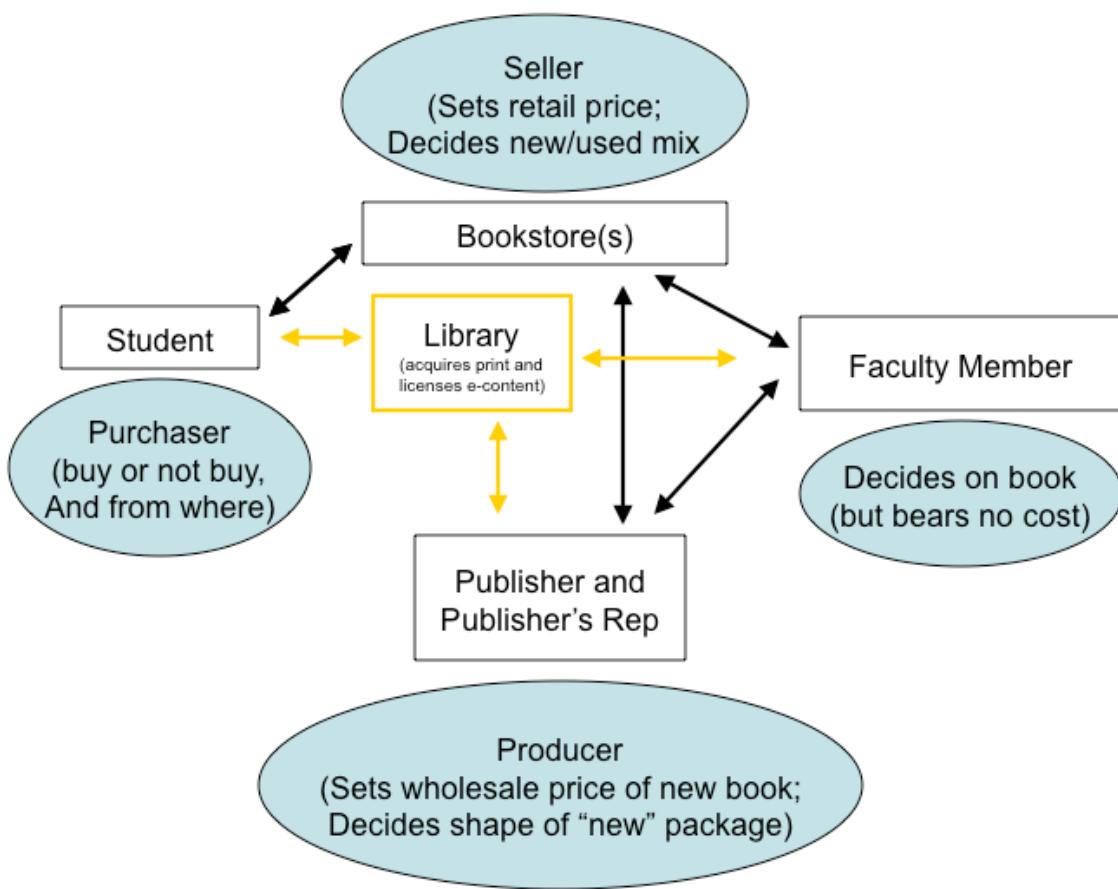
## **A Changing Landscape and New Developments**

The following discussion is based on interviews and a review of reports, news and journal articles, and websites. See Appendix F for a selection of references used as part of the Task Force's information-gathering.

There is a national ferment surrounding electronic books and e-readers, textbook delivery methods, and proprietary/Digital Rights Management versus open-content format and publishing models, all of which are exacerbated by rapidly changing technology and the impact of the recession and shifting reader habits. National and state legislation is being passed to address the issue of textbook costs. What is clear from the complexity of the current landscape is that there is no single means to reduce the costs of textbooks.

## **A Complex Model**

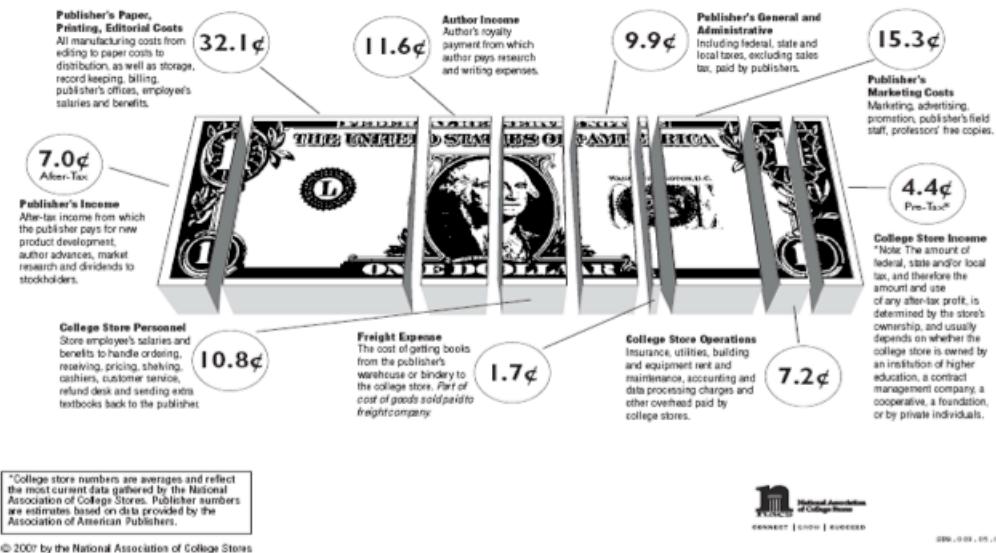
The Task Force developed the model below to demonstrate the complexities of the interactions between all the participants involved in providing affordable textbooks for students. There are five parties to the supply and demand transactions: students, faculty, campus Library, bookstore, and publisher.



The textbook market differs from most other markets in that textbooks are chosen by faculty, not by the students who pay for them. This market model might resemble the market for prescription drugs as doctors prescribe drugs while the patient pays for them. Lowering student costs requires greater faculty awareness of and concern for the price of course materials. In effect, faculty are the agents for students when choosing course materials.

The National Association of College Stores has prepared a graphic on where the new textbook dollar goes, below. As can be seen, the bulk of the costs relate to publishers' expenses.

## Where the New **Textbook Dollar** Goes\* ...



### Rising Costs of Textbooks

There are many reasons for the high price of textbooks. One factor is the nationalization of the used book market which has changed the sales of new books—both the quantity and the timing. When used book markets were localized, more new books were sold each year and a larger share of the new books were sold beyond the first year after publication. When students buy more used books, all the fixed costs of producing a book must now be spread over a smaller number of new books. The fixed costs are quite high relative to the additional cost of producing one more book. The wholesale price of a textbook has therefore risen as the used book market has become more efficient.

In addition, new textbook editions are costly to produce, and publishers must recoup their fixed costs in the first year of issue because of the used book market; this creates an incentive to issue new versions more frequently. Each time an instructor selects the new edition of a textbook, students generally have to buy this edition new rather than less expensive used books. Publishers have also boosted prices by bundling textbooks with CD-ROMs and workbooks, supplemental materials that may not be used in class; however, publishers must unbundle these items if requested.

Printing, shipping, and warehousing costs for print versions have an impact on textbook costs, but some observers note that electronic versions may not be cheaper than print used books given buyback prices (see Appendix E).

Students have found multiple ways of lowering the costs of their textbooks, but publishers are fighting back. Some students buy international versions of textbooks which may be identical and cheaper, but their importation has been challenged legally by publishers on copyright infringement grounds (international textbooks may not always be identical, so students may obtain the wrong book). Publishers are also challenging the downloading of free pirated copies of texts from such sites as Textbook Torrents and RapidShare (such has taken place with music file sharing); a recent ruling by a German court in response to a suit by six major publishers<sup>8</sup> ordered that certain copyrighted books be removed from the RapidShare site. The Association of American Publishers has developed guidelines for file-trading sites to stop unauthorized copies of books from appearing on these websites.<sup>9</sup>

Interestingly, the Association of American Publishers has started a website (<http://www.textbookfacts.org>) to show that they are addressing textbook costs through presenting students with a range of options including lower-cost e-texts; a “Cost-Effective Solutions for Student Success” program has been developed by the Association, and they are contacting colleges and universities to make presentations.

### **Legal and Legislative Mandates**

State and the federal governments are exerting pressure to make textbooks more affordable, enacting a variety of legislation. These efforts may or may not have an effect on textbook affordability, and may be costly for campuses to implement, but they indicate the level of concern nationwide about the trend toward higher textbook prices. Below is a sampling of national and state legislation.

**Federal level.** The federal Higher Education Opportunity Act of 2008 stipulates that in 2010 course book lists with ISBNs should be available through the schedule of classes at all American colleges (see Appendix G for the HEOA provisions). Berkeley’s Office of the Registrar is working with Follett to meet the requirements of the HEOA to publicize course booklists through the schedule of classes. Follett has developed a BookLook™ interface to accomplish this through its stores nationwide; the schedule of classes now has a link to BookLook™ and Follett will have responsibility for collecting and maintaining booklists. Both new and used prices will show on BookLook™ even if used aren’t available. More information about BookLook™ is available at <http://content.efollett.com/HEOA/>.

Another federal initiative is the “American Opportunity Tax Credit” which offers tax credits in 2009 and 2010 to help students recoup textbook costs (<http://www.textbookaid.org>).

House and Senate members introduced bills including H.R. 1464: Learning Opportunities with Creation of Open Source Textbooks (LOW COST) Act of 2009<sup>10</sup> which promotes the development of open source materials by federal agencies, and S. 1714: Open College Textbook Act of 2009<sup>11</sup> to promote freely available online open course materials which encourages open licensing. In 2010, the Obama administration will be undertaking a study of the open access model of publishing in which materials are made available free online as part of the Open Government Directive.<sup>12</sup>

**State level.** Significant efforts are being taken by state legislators nationwide. According to an analysis by the University of Michigan, “In 2007 alone, more than 85 bills in 27 states dealt with textbook affordability. By the end of 2007, 10 states had enacted 15 laws or resolutions to reduce textbook costs”<sup>13</sup>; 13 states had introduced bills to make textbooks tax exempt.<sup>14</sup>

In California, the College Textbooks and Electronic Versions Act (S.B. 48)<sup>15</sup> has mandated that by 2020 public and private postsecondary institutions must use texts available electronically “to the extent practicable.” A 2004 law encourages publishers to unbundle textbooks and specify changes in new additions (A.B. 2477).<sup>16</sup> The 2007 College Textbook Transparency Act<sup>17</sup> (A.B. 1548) required that textbook prices be disclosed to faculty members, that bookstores disclose retail pricing policies, and that publishers indicate changes between previous and new editions.

### **Technological Changes: Digital Educational Resources**

Perhaps the area with the most potential to affect textbook prices is the rapidly shifting technology landscape, particularly in terms of electronic versions of textbooks and the increased capabilities of e-readers. For some time, electronic versions of textbooks have been plain PDF files readable on a computer or laptop, sometimes with note-taking capabilities or other features. Costs can vary (see Appendix E). Publishers are moving towards electronic versions with more interactive features (links to other sites, multimedia, note taking, customizable text, etc); however, Berkeley’s Assistive Technology Teaching and Learning Center has tested a number of these texts and found that the features are not fully accessible for students with disabilities.

**E-readers.** While enhancements continue to be made on e-texts readable on laptops, considerable industry optimism has focused on the development of e-readers such as the Amazon Kindle, Barnes and Noble Nook, and the Sony e-Reader, and on the possible impact on textbook sales of the new Apple iPad. E-reader technology in general is in rapid transition, and is characterized by the development of two conflicting e-text approaches: a) a proprietary or digital rights management (DRM) model on the part of many e-text readers and vendors, which renders certain file formats that can’t be shared and/or are inaccessible to screen reading software, and b) an open access/ content model, which is predicated on open and cross-platform readers such as the forthcoming Blio reader (<http://blioreader.com>) and in models pursued by open textbook vendors such as FlatWorld Knowledge (<http://flatworldknowledge.com>). Note: UC Berkeley will become one of the first higher education beta test sites for Blio which could be a game changer for the e-text market/experience.

There is much hype about e-readers, but also considerable speculation whether these devices will withstand time. Obstacles to adoption include a broad lack of standards and common platforms, uncertain demand, accessibility issues, copyright issues (books have been “pulled” after purchase from the Kindle by Amazon after copyright concerns), incompatible viewing hardware, and so on. Publishers and vendors such as Amazon are not sure what the next e-text format will be or if e-readers such as the Kindle, Nook, iRex, and Sony e-Reader will become industry standards. In addition, the eDGe and other “hybrid” devices are being developed to meet the needs of textbook readers better than standard e-readers. These typically have a separate color screen to display graphics and charts, with interactive connections with the text on the e-reader screen. A study of the Kindle at Reed College concluded that the current e-reader was unable to meet student and

faculty needs.<sup>18</sup> There is general agreement that the limitations of these devices have not yet been overcome. Some observers speculate that versions to be read on laptops and notebooks will emerge as more popular and less expensive than e-readers; for example, in a study of the Sony e-Reader, Northwest Missouri State found that students gave the project mixed reviews; later, laptop versions of e-texts proved more successful<sup>19</sup>. Others believe that the Apple iPad holds much greater promise for educational users of e-texts.

**E-textbooks.** Various studies have shown low sales and considerable student resistance to conventional e-texts. A recent study by Campus Watch (2010 Student Watch Report) found that even with new smart phone and hand-held digital technology, nearly 75% of students surveyed prefer a printed textbook for their courses. As previously noted, the Cal Student Store sells only a small fraction of electronic texts compared to new and used print versions. While sales of electronic books continue to grow,<sup>20</sup> e-books have not yet been a significant percentage of the textbook market (about 2-3% according to the National Association of College Stores). Some students and faculty continue to demonstrate cultural resistance to the idea of digitally based course materials in general (again, publishers and vendors do not yet know if improved e-readers and e-text formats will overcome this resistance). Cited concerns from the reader perspective include not being able to readily flip pages or easily compare two pages or two texts in class, as well as the general difficulty of underlining, highlighting, note-taking, cutting and pasting into new files and annotating within some types of e-texts. Faculty often express fears that these difficulties prevent students from “engaging” deeply with born-digital texts. Another factor is that many types of e-texts currently available are on a “rental” system, effectively expiring after the semester is over (e.g., CourseSmart.com).

## Open Course Materials

**Open Educational Resources movement.** Technological changes are also facilitating the development of open course materials, which have drawn considerable interest from academia, entrepreneurs, and state and federal legislators. This movement is commonly called Open Educational Resources, or OER. This movement may hold promise for decreasing the costs of textbooks to students if made widely available, subject to a peer review process, and used confidently by faculty.

The term “open” seems to be used in a variety of ways: open source, open content, open access, open textbooks, open educational resources, and so on. While many interpret “open” material as existing implicitly without charge, in fact open content does not mean free content. For example, according to Wikipedia, open describes any kind of creative work or content, published under a license that explicitly allows copying or modification, whether fee-based or free.

Some people erroneously associate “open” with low quality, assuming that open or born-digital content lacks the rigorous peer review and editorial oversight given to traditional print publications. In this sense, “open” describes a burgeoning new paradigm in academic publication and scholarly communication, one based on collaborative production and broad, non-exclusive distribution. Various groups and organizations (particularly Creative Commons) are working to debunk common myths associated with “open” course materials, assure their high

quality, protect intellectual property, and provide opportunities for compensation to authors who produce open content.

**Open resources: California.** The Open Educational Resources Center for California (<http://grou.ps/oercenter/>) has been established by the state legislature to collect open and free course materials, intended for use by California's community colleges; the site includes peer reviews. The Community College Consortium for Open Educational Resources (<http://oerconsortium.org/>) established by the Foothill-De Anza Community College District, was created to identify, create, and/or repurpose existing open educational resources as open textbooks and make them available for use by community college students and faculty. The California State University's Digital Marketplace (<http://www.dmproject.org/>) is designed to be one-stop-shopping platform for locating, selecting, and authoring digital resources. The CSU's have also established MERLOT (<http://merlot.org>) as a collaborative effort to share online materials. To date, the UC system has not established a similar program.

**Open resources: National.** OpenCourseWare (OCW) was started by the Massachusetts Institute of Technology in 2001 to provide open educational content for MIT courses. The OCW Consortium<sup>21</sup> grew out of this effort (<http://ocwconsortium.org>) and is a non-profit association of OCW publishers worldwide (involving about 200 universities to date). UC Berkeley is a member of the OCW Consortium and the campus is building an open source platform for the development and distribution of video and audio content (<http://opencastproject.org>).

Other national repositories enabling the creation, sharing, and modification of open educational material accessible to anyone include: Maricopa Learning Exchange (<http://www.mcli.dist.maricopa.edu/mlx>), WISC-Online (<http://www.wisc-online.com>), the North Carolina Learning Object Repository (<http://nclor.learnnc.org>), and Rice University's Connexions (<http://cnx.org>), among others. In addition, books that have been digitized by various libraries and organizations have been placed in the Internet Archive (<http://www.archive.org>) and Hathi Trust (<http://catalog.hathitrust.org>). These materials are freely available but underexposed and underutilized. Flat World Knowledge is another entity that has designed ways to organize and share open-source content. Flat World Knowledge provides free online textbooks through Creative Commons licenses, making money through options to purchase hard-copy formats, audio books, and individual chapters. The Book Server internet archive nonprofit system (<http://www.bookserver.org>) helps people find e-books on the internet: anyone who offers digital books can index them with the site. The site itself is free though some books will cost.

All these California and national repositories are scattered, lack coordination and may be largely unknown to faculty.

**Studies of Open Educational Resources.** In 2008 the Student Public Interest Research Group (SPIRG) started a two-year campaign, "Make Textbooks Affordable" (<http://teaching.berkeley.edu/textbooks/resources.shtml>) to change faculty behaviors and encourage use of open educational resources. In 2009 Berkeley's Center for the Study of Higher Education carried out an evaluation of this campaign<sup>22</sup>. The results, based on focus groups and a small survey, indicate that faculty will not take well to "one size fits all" solutions (e.g.,

prodding instructors to select only electronic materials). Faculty want a diversity of choices when they choose a textbook. Faculty also made clear that their students, too, desire flexibility and choice in textbook options. Data show that electronic solutions will not be universally embraced in the near term. Regarding open textbooks, there are not enough currently available in enough disciplines to satisfy the multitude of faculty and student needs in lower and upper division courses; a much wider array of high-quality, easy-to-use, and reliable open textbooks will have to be produced for more widespread faculty adoption to be realized. Even then, open textbooks will likely be only one option in the curricular materials market. A summary of the evaluation project and a downloadable PDF of the final report are available at <http://cshe.berkeley.edu/research/opentextbooks/index.htm>.

**Copyright.** Key to the success of open materials is the management of copyrights. Creative Commons is a nonprofit that works to release some copyrights to increase access to books and to intellectual property. Its iconic two c's in a circle invites people to take advantage of the materials it licenses for unrestricted sharing and reuse. Materials under Creative Commons licenses retain copyright protection, but their creators have greater flexibility in determining the extent and nature of use restrictions than are available under works protected by traditional copyrights.

**Development of materials.** Universities are organizing incentive systems to encourage the development of open-source materials. For example, the University System of Ohio offers incentives to its professors to create free materials for commonly taught courses, including \$50,000 grants.<sup>23</sup> The University of Wisconsin Oshkosh is carrying out a FIPSE grant to commission professors to create personalized texts in digital format for nominal cost to students (\$15); the faculty member writes 80% and the rest is customizable by other professors, and internal and external review of materials provides quality control by students and faculty.<sup>24</sup>

### **Actions by Publishers, Vendors, and Online Companies**

The textbook publishing and sales markets are significantly influenced by a variety of actions by the publishers themselves, by other vendors, and by Amazon which is involved in multiple sectors.

**Publishers.** Five publishers (Wiley, Cengage, McGraw Hill, Pearson, and Worth) control about 80% of textbook production, and four wholesalers dominate textbook distribution, especially used books. Textbook publishers have been hit hard by changes in publishing economic models, by the flux in technology, and by the overall recession. New business models and ventures are being explored by publishers as they struggle to adjust to the changing landscape. How this will impact textbook affordability is unknown.

In an effort to capitalize on electronic delivery, a consortium of major textbook publishers started CourseSmart which offers over 9,000 e-texts on a “rental” basis (subscriptions expire after a set time); the cost is purportedly cheaper than the price of a new book, but consumer response to traditional electronic formats has been notably low. To entice new customers, publishers are expanding the range of their electronic offerings: Wiley has developed several “lines” of e-text options from PDFs to their interactive “Wiley Plus,” while Macmillan has announced

“DynamicBooks”<sup>25</sup> which allows professors to customize e-texts, adding custom material and interactive features. Overall, however, publishers are not sure what the next e-text format will be, especially given new entries in technology such as the iPad and the move from PDFs to interactive e-texts.

In addition to the uncertainty about formats, publishers are not sure what the pricing structure for e-books will be. Currently publishers are negotiating higher prices for e-books with Apple and Amazon (up from the \$9.99 price), drawing consumer resentment.<sup>26</sup> In addition, Google Books is entering the e-book market with its own publishers’ agreements.<sup>27</sup> Authors are beginning to move their electronic versions away from their traditional publishers to online outlets such as Amazon.<sup>28</sup> It isn’t clear yet how much attention Amazon and Apple are paying to making their formats accessible to readers with disabilities.

**Vendors: rentals and online marketplaces.** A variety of initiatives are being taken by retailers to adapt to changing markets and needs. The textbook rental market is gaining momentum. The National Association of College Stores estimates that as of January 2010, 200 of its member campus bookstores offer rental programs. They are predicting that by Fall 2010, 1500 bookstores will rent textbooks. While modest programs have existed at individual colleges for a number of years, college bookstore chains such as Barnes and Noble and Follett are now implementing major efforts. Follett plans to spend \$100 million to set up rental programs at a large percentage of its 860 campus bookstores. The Cal Student Store will offer a rental program in Fall 2010. In general, a \$100 textbook will rent for \$45 for the semester. Locally, Ned’s Books, run by the Nebraska Book Company, began a rental program in Spring 2010 for up to 300 new and used titles. Nationwide by mail textbook rental programs are being established by independent companies online (e.g., Chegg.com, bookrenter.com), modeled after the DVD-by-mail model. These mail textbook programs are beginning to partner with campus bookstores. At least one textbook publisher (Cengage) has entered the rental market.

Anecdotally, some bookstores nationwide are seeing surging student interest in renting textbooks, even if more costly than buying a used book and selling it back, because of minimal upfront costs. A national survey of students by the National Association of College Stores conducted in May 2010 revealed that 12% of the respondents had rented textbooks and about half of those who haven’t done so would consider it.

This trend toward rentals brings up issues regarding accessibility for students with disabilities. The consensus is that disabled students have the right to rent books like other students. However, federal and state laws require that students own the book before they can be provided with the alternative format to make it accessible. The interpretation is that while the student has a rented book the student technically owns the book. On some campuses, if the book cannot be found in an electronic form, the campus is not allowed to cut and scan the book and must rely on the publisher to provide the files or a desk copy. The Cal Student Store, however, does allow the campus to cut and scan the book as long as the book is rebound before being returned to the bookstore. The Cal Student Store will not consider the ATTLC’s binding as “excessive use.”

Online marketplaces are springing up nationally that allow students to sell books to each other at higher prices than they could receive selling their books to bookstores (e.g.,

<http://textbookx.com>). Locally, there are two on-campus online book swaps: Berkeley Book Exchange (<http://comegetused.com>) and the ASUC Book Swap (<http://asuc.org/bookswap>).

Another type of venture is Follett's development of CafeScribe (<http://www.cafescribe.com/>) which will offer access to electronic texts in a social networking format. The National Association of College Stores in collaboration with Canadian Campus Retailers Inc. has established a single e-book portal at participating college bookstores so that students can download electronic materials easily<sup>29</sup>.

**Online companies.** Amazon currently continues to dominate and shape the book selling and buying market, most currently (as of this writing) entering into a textbook buy-back program by mail in addition to its launching in 2009 of the large-size Kindle DX<sup>30</sup> suitable for textbooks. Amazon and other vendors are developing e-books and reader software for smart phones. Google is entering the e-book market beginning in summer 2010 (called Google Editions) which will allow users to read books from a web browser, independent of the type of e-reader device.

## **Library Initiatives**

The Berkeley campus Library is a major resource in initiatives to reduce textbook costs. Extensive e-book and e-journal collections are available through the Library's website, content that is linkable, accessible from off-campus,<sup>31</sup> and already subsidized through the Library.<sup>32</sup>

The Library's eReadings program (<http://lib.berkeley.edu/services/ereadings.html>) seeks to encourage faculty to use electronic articles and e-books for which the campus already has a paid subscription, a strategy that can significantly lower costs to students incurred by copyright clearance fees through vendors such as Copy Central. Investigating linked Library subscription content can supplement a print reader or produce an entirely online reader, which students can access and print as needed through a bSpace or other authenticated course website. (See <http://tinyurl.com/ucbereadings> and [bspacehelp.berkeley.edu](http://bspacehelp.berkeley.edu) for guidance on locating digital content and linking to Library resources in bSpace.) In addition, instructors can contact their Library Liaison for information on the availability of digital texts within their discipline at <http://www.lib.berkeley.edu/Help/liaisons.html>.

A free Library-provided scanner is available to faculty and their proxies in Moffitt Library for creating OCR-compatible digital documents for uploading into bSpace (see <http://tinyurl.com/ucbereadings> for more information)

The Library has partnered with Educational Technology Services to demonstrate best practices for integrating eReadings into bSpace, including raising awareness around copyright and fair use implications of digital course readings. Regular workshops and discussions are held in the ETS training facility; and schedules of event can be found at <http://ets.berkeley.edu/bspace>.

## **Copyright Considerations**

Copyright and fair use in higher education are complicated topics that often impact the use of course materials by exacerbating faculty confusion and concern around infringement and permissible duplication and distribution of copyrighted material.

The Library assists faculty by providing guidance on fair use and copyright issues in scholarly communication (<http://www.lib.berkeley.edu/Collections/copyright.html>), and via initiatives such as Know Your Copyrights (<http://www.knowyourcopyrights.org/>).

The campus has appointed a copyright-focused legal counselor to help clarify rules and regulations and aid in initiatives intended to educate students and faculty about copyright issues, such as the eReadings program.

Other initiatives in copyright nationally include:

- The City University of New York's Baruch College has released an interactive guide to using multimedia in courses with step-by-step verbal and written instructions on determining what materials can be used in courses legally (<http://www.baruch.cuny.edu/tutorials/copyright/>).
- Reed College has a traditional Web page that offers advice about using materials, with links to information from other college Web sites ([http://www.reed.edu/cis/policies/copyright\\_guide.html](http://www.reed.edu/cis/policies/copyright_guide.html)).
- The University of Maryland University College also has a site that has information for students and professors who want to legally use copyrighted material in classes and on the Internet (<http://www.umuc.edu/library/copy.shtml>).
- The U.S. Copyright Office has been seeking comments on possible solutions to enhance the accessibility of copyrighted works.<sup>33</sup>

### **Instructor Behaviors and Preferences**

Most faculty are aware of the high price of textbooks and try to control costs. However, faculty often have difficulty finding the price of the textbooks that they're considering assigning, making it difficult for them to use cost as a consideration in book selection. They may be reluctant to use digital course materials until they have empirical evidence about the quality and the impact of e-books on student learning.

For a variety of reasons, some beyond their control, faculty vary in their adherence to textbook adoption deadlines for the campus bookstore; delays mean that the store is less able to locate cheaper used textbooks. In turn, however, the practice of bookstores obtaining and selling more used books has lowered the sales of new books and thereby driven up the publisher's new book price. Some faculty, for pedagogical reasons, use a different textbook each time they teach the class, and some faculty don't always notify the bookstore promptly if they are going to be using the same textbook next semester. If the bookstore does not get enough notice about the textbooks required for the classes, they are not able to buy back books at the highest price possible (which assumes the book is being used in the coming semester). In addition, they are not able to locate as many used textbooks that are cheaper for students to buy, and students do not have as much time to shop around for the cheapest copies, for example, through book swap websites and online new and used retailers.

Further, faculty may not be aware of the extent of availability of Library-licensed content, or the best-case-scenario copyright feasibility of linking to this subscription content through a bSpace or other course website (see Copyright section above). Outsourced readers must all be treated the same. Any vendor that is producing these readers must pay the copyright clearinghouse by number of students in the class times the pages per article. There is some speculation that some vendors may underestimate the number of students, and statistics show that many students do not buy readers due to the cost. If numbers are underestimated or students do not buy the readers, the cost may be very high for the actual use of the reader. Some readers may cost upwards of \$200 or more due to the copyright expense.

Another factor raising interest nationwide is the fact that some faculty textbook authors require their book (and each new edition) for their own courses, or they create their own readers and take a markup from commercial copiers. In these times of furloughs and depressed salary levels, faculty rely on royalties to supplement their incomes. However, some observers view this as a potential conflict of interest.

Some universities currently have policies in place on use of faculty-authored textbooks, ranging from “pre-approval by the dean or department chair required” to “proceeds/royalties based on faculty estimates must be donated to departments, scholarship funds, or other nonprofits” to allowing “each academic department to establish its own policy appropriate to its circumstances for the selection of instructional materials whose purchase by students results in a financial benefit to the faculty member who assigns those materials.” Overall, institutions with such policies restrict the amount of financial gain or implement safeguards that protect instructors from accusations that they are not considering teaching needs above profits they receive.<sup>34</sup>

### **Disability Access**

As the Task Force carried out its work, it learned about a number of issues related to the access of students with disabilities to course materials (textbooks and readers). The Disabled Students’ Program’s Assistive Technology Teaching and Learning Center converts textbooks and readers to alternative formats. In particular, conversations with staff of the campus’ ATTLC revealed the following issues:

- Publishers do not offer any uniformly accessible, standardized format for electronic texts. The ATTLC has or is testing electronic formats from CourseSmart, Kindle, Wiley, and others, and has found that either they are inaccessible, or, if accessible, do not provide an equal experience to the student with a disability (e.g., interactive formats, multimedia, on-screen help features, etc.). Some publishers say they will provide a text-only e-file which limits the students’ access to features such as notes and highlighting available in the enhanced versions.
- There is growing activism on the part of disability organizations concerning accessibility of burgeoning electronic text options. For example, the National Federation for the Blind settled a lawsuit<sup>35</sup> against Arizona State University regarding its participation in Amazon’s Kindle DX textbook pilot, charging that the Kindle is not fully accessible for students with

some types of visual disabilities; in response, Syracuse and Wisconsin/Madison held off on expanding a Kindle pilot until Amazon made it more accessible.<sup>36</sup> This organization has sent letters to UC Berkeley concerning accessibility issues, as well as to other universities and colleges in California.

- Permissions to convert texts are difficult to obtain from publishers, as are e-versions. There is no standardized way to contact publishers; each publisher must be approached differently, information on their websites is often unhelpful, and the publishing field experiences high staff turnover. A great deal of ATTLC staff time is spent problem solving. Even after a publisher is contacted, the response may be delayed for weeks or months, having an impact on a student's ability to have full access to a course; some publishers never respond. If a PDF is available, sometimes it is locked or unreadable. Some texts are simply not available in e-versions, especially older books; these books must be "cut" and scanned page by page at the ATTLC.
- Several options are available to alternative media services for accessing electronic copies of textbooks. At Berkeley, the ATTLC primarily finds texts through AMX (the Alternative Media Exchange Database), run by De Anza College; all California community colleges and 125 universities nationwide participate in AMX. Another option is the AccessText online database (<http://www.accesstext.org>) which tracks down accessible course materials from publishers and obtains permission to scan pages. As of November 2009, approximately 650 colleges in the U.S. including Berkeley are participating in this collaboration between the Association of American Publishers and the University of Georgia<sup>37</sup>; however, in June 2010 this service will start charging a yearly fee for electronic texts that are currently obtained free from AMX. Students can independently sign up for the Bookshare online library (<http://www.bookshare.org>), which has an agreement with university presses to provide accessible books for individuals with visual disabilities. Bookshare obtains digital files from publishers and converts them to files that can be read using Braille embossers or text-to-speech software. Bookshare also makes available open content textbooks accessible to readers with print disabilities through a partnership with FlatWorld Knowledge.
- Kirtas Technologies<sup>38</sup> is testing through several American universities a machine that digitizes books, turning the pages automatically, up to 3,000 pages an hour that would make it faster and easier to prepare alternative formats. This would allow students with disabilities to sell back books as they would not have to be cut and made unsellable.
- Locally, efforts are being undertaken by the ATTLC to obtain earlier access to course lists directly from faculty because so few instructors meet adoption deadlines.

In addition to complexities of converting textbooks to alternative media, the ATTLC reports that the material faculty submit for course readers (hard copy or PDF files) is sometimes unreadable upon scanning or doesn't copy well. Some readers have to be manually retyped in their entirety taking much staff time.

## **Recommendations**

The Task Force presents the following recommendations for next steps. Guiding principles in shaping these recommendations include acknowledging that there is no “one size fits all” solution to the complicated topic of textbook affordability, assuring that students have maximum choices in where and what format to buy books, recognizing faculty autonomy in making decisions about course materials, and seeking standardization and strategic vendorizing when possible to keep prices affordable.

- 1. Leverage the purchasing power of the University to aggressively reduce the costs of new textbooks by lowering the markup between publishers' price and retail price and/or by lowering the publisher's price itself.** It is neither practical nor cost effective for individual faculty to negotiate lower prices with publishers' representatives. Rather, the campus could explore leveraging its large purchasing power for, say, large-enrollment lower division classes into greater discounts from publishers or could join with other UCs, the California Digital Library, regional colleges and universities, or other peer institutions to leverage the purchasing power of a larger entity.
- 2. Leverage the purchasing power of the University to aggressively work with publishers on issues of accessibility for students with disabilities.** The Task Force found that publishers need to be more attentive to issues of access for students with disabilities, including fully accessible electronic formats, standardized methods for requesting specific texts from publishers, and the like. Berkeley's national leadership in disability issues could influence industry change in this area.
- 3. Create and implement a comprehensive marketing and educational strategy for students and faculty.** A number of affordability issues could be ameliorated through sustained and focused educational efforts. A faculty-led educational effort could focus on:

Strongly encouraging faculty to:

- submit their book lists to the Cal Student Store which benefits students who wish to a) do one-stop shopping for textbooks; b) check master booklists through BookLook™ before the course begins; c) or use their Cal One cards. In addition, some profits from the Cal Student Store go to ASUC student activities. For those faculty who prefer other vendors, they should be encouraged to also list their book orders with the Cal Student Store in the spirit of reducing costs so that students have the widest options for where (an array of outlets) and how (rental, used, new, etc.) to purchase textbooks.
- meet Cal Student Store textbook adoption deadlines which allows buybacks at higher prices (if it is known that the text will be used in the upcoming semester) and more used textbooks to be available to students.
- submit course readers promptly to the Disabled Students' Program's Assistive Technology Teaching and Learning Center, when requested, so that students with disabilities can have access to course materials before the start of the term.

In addition, an educational campaign can help faculty see the steps they themselves can take to keep textbooks affordable:

- meet the textbook adoption deadlines set by the Cal Student Store.
- post required textbooks at least two or three weeks ahead of the start of the semester with ISBN as well as author, title, publisher, publisher's cost, copyright date and edition number to allow students to comparison shop.
- use price in the textbook adoption process; if the academic quality is comparable, consider adopting the less expensive textbook.
- check to see if the Library has an e-version of a given textbook that all students can access for free.
- avoid purchasing bundled packages if they are more expensive; publishers are required to unbundle course materials upon request.
- acquire from the publisher one or more copies of textbooks to place on library reserve for use by students (if the Library does not already have copies) or be given to the alternative media coordinator to cut and scan when there is no other option.
- use open resource textbooks and course materials as much as possible.
- create online readers that combine open access content with e-book and e-journal content licensed by The Library and available for linking (either within the course webpage or the campus learning environment bSpace). Copyright guidance [<http://www.knowyourcopyrights.org/bm~doc/kycrbrochure.pdf>] for those pursuing this path is available online.
- commit to the same textbook and edition for two or three years to ensure a supply of used books in the market place and to allow the title to be part of a rental program.
- let students use an older edition of the textbook and identify which parts are different from the newer edition. Note: the Higher Education Opportunity Act requires that the publisher provide general descriptions of changes that have been made in new editions.
- let the Cal Student Store know in a timely fashion if the same textbook will be used the next time the course is taught.

Grants through the Office of Educational Development could be designated specifically to help faculty identify, research, and locate affordable materials, including checking content licensed by the Library.

Information about textbook affordability and tips in keeping costs down can be made available to students through CalSO, the Resource Guide (<http://resource.berkeley.edu>), Tele-Bears, and bSpace. The intent of the educational effort is to make students aware of the options in selecting textbooks and the variety of ways they can access course materials (purchase new online or from brick and mortar vendor; purchase used online or from brick and mortar vendor; rent online or at bookstore; use older editions, loose-leaf copies, e-versions, etc.). See Appendix H for tips for students for purchasing textbooks.

**4. Re-engineer the book ordering process to encourage more timely submissions and earlier indications of whether the same textbook will be used the next time the course is offered.** Meeting Cal Student Store adoption deadlines will translate into more used textbooks available for students; the national marketplace for used textbooks is very competitive and the

sooner titles are identified, the more likely used inventories can be obtained. In addition, students can receive higher prices in selling their books back to the Cal Student Store if it is known that the book will be used in the course the next term. In collaboration with the Cal Student Store, rethink the book ordering process, in light of departmental staffing reductions, budget issues, and changes in technology. Work with the store to develop routine feedback mechanisms to identify what works and doesn't work from faculty members' perspective. Appendix I contains a sample survey that could be distributed to faculty. Some universities such as the University of Wisconsin and the University of Oregon have created online book order centers that streamline and make strategic the book ordering process.

**5. Develop policies regarding faculty who require their own textbooks for courses they teach.** While some people feel it is a conflict of interest for faculty to assign their own textbook to students and collect the royalties, others argue that faculty members should be able to assign their own books if it is for sound pedagogical reasons. Faculty authors can spend three to five uncompensated years writing a book, and royalties provide financial compensation. Some observers have noted stopping the practice will not make textbooks more affordable and that royalties to faculty may be very low or even zero. Some institutions require faculty who assign their own textbook in their courses to estimate royalties made from textbooks purchased by students in their courses and donate an amount to their departments, schools, scholarship funds, or other nonprofit group. It is up to the faculty to estimate the royalties they believe come from their students' purchases and to return that amount to their institution, since obtaining sales information can prove particularly difficult because of the many ways in which students purchase materials. Other universities have let individual departments decide whether to institute a policy.

**6. Carefully monitor the implementation of federal and state legislation regarding textbook affordability to make sure the campus is in compliance.** Some members of the Task Force expressed concerns about a commercial entity (Follett) having responsibility for the campus booklist, as specified in the Higher Education Opportunity Act. Given the lack of resources on campus to develop and manage the booklist itself, the Task Force acknowledges and appreciates the help that Follett is providing. The Task Force believes that it would be useful for a committee (see Recommendation below) to monitor and oversee the roll out and use of BookLook™. In addition, the Task Force recommends that this same committee monitor the ongoing relationship between the Cal Student Store and the university in terms of affordability of course materials; does the financial model currently in place serve the needs of all constituencies?

**7. Keep abreast of new developments in technology and existing campus systems such as bSpace and Kuali that intersect with textbooks and readers.** The campus is engaged in major planning efforts for the long-term effectiveness of Berkeley's student systems, including bSpace, the learning management system, and Kuali, a set of integrated student systems based on open-source software. It is important that options to integrate affordable and easily accessed textbooks and readers be discussed as part of this larger planning process so that the number of standalone systems on campus can be minimized and students can easily and transparently obtain course materials.

**8. Expand the Library's eReadings program and better educate faculty about copyright issues and costs of readers.** Find ways to expand the eReadings program in the Library to let faculty know how the Library's copyright holdings can minimize the costs of readers. Make known the campus's liability if faculty or the commercial copy center they use are not obtaining appropriate permissions to duplicate materials for students. Research other ways the campus can reduce the cost of readers for students.

**9. Support the use and development of open educational resource materials by faculty through increased awareness of existing resources and encouragement to create new materials.** Faculty in general and those compiling readers in particular can be informed about the availability of free journal articles and book content via Internet Archive, Hathi Trust, Google Books, and institutional repositories such as eScholarshp and dSpace@MIT, and open access repositories such as arXiv and PubMed Central. As the University of California explores and pilots online delivery of courses, Berkeley can seek opportunities to encourage the development of open educational resources to be used in these or other classes.

**10. Create a faculty/student textbook and course readers standing committee to address affordability issues and new technologies as they emerge.** Because of the rapidly changing landscape in the area of textbooks and readers and the need to stay current on new developments, the Task Force recommends that a Committee on Textbooks and Readers be appointed on an ongoing basis. The Task Force is well aware of the need to reduce the number of committees on campus and the difficulty in getting participation, given the increasing demands on people's time. However, with the rapid shifts in technology, publishing models, price structures, and increasing student comfort with a range of new devices, the campus should monitor the issue of textbook access and affordability, especially given the impact of the national economic recession and the state's budget crisis on Berkeley's students.

The challenge for the campus in moving forward will be to identify how best to carry out the recommendations in this report or other efforts related to lowering the costs of textbooks. A Committee on Textbooks and Readers can provide advice and oversight on this important topic. The Task Force also recommends that there be a small Working Group of knowledgeable staff members who could undertake the necessary tasks in this area.

The Committee on Textbooks and Readers could:

- oversee the work of the Working Group
- monitor the implementation of the Higher Education Opportunity Act as it relates to textbooks
- aggressively work with publishers to lower prices, leveraging the purchasing power of the University
- aggressively work with publishers on issues of accessibility of textbooks
- explore the feasibility of new economic models for textbook purchases such as site licensing<sup>39</sup>
- identify strategies to promote the use and development of open educational resource materials

- review data collected by the Cal Student Store on adoption rates and other metrics to measure changes in practices
- monitor adoption deadlines of textbooks in large lower division courses and take actions as needed
- work to encourage the Cal Student Store as a strategic vendor for the campus as Operational Excellence proceeds
- keep abreast of new technologies and changes in the publishing industry as they impact textbook and reader costs
- generate metrics to track the campus's progress in reducing the costs of textbooks. Possible metrics include:
  - number of book orders placed by the adoption deadline
  - amount saved by students in textbook purchases based on data from bookstore comparing new, used, rental, and e-versions
  - number of faculty switching to lower-cost alternatives (for example, loose-leaf versions, open educational resources, etc.)
  - reduction in textbook prices as a result of negotiated arrangements with publishers

The Working Group could, to start:

- revamp the book ordering process, in collaboration with the Cal Student Store
- develop comprehensive educational strategies for faculty and students regarding textbook costs, for implementation in Fall 2012, based on the suggestions in Recommendation 3
- develop strategies to educate faculty about copyright issues and reader costs
- create incentives such as a targeted grant program to encourage faculty to make greater use of Library licensed materials for their course readers (grant funds could be used to hire students to comb through the Library holdings)
- tally the costs of textbooks for undergraduate majors to give students (and departments) a sense of the costs of various academic programs
- create questions about textbook affordability to be inserted in the next iteration of UCUES
- work with the Financial Aid Office to separate out the costs of textbooks in their surveys of students
- Keep the textbook affordability website updated (<http://teaching.berkeley.edu/textbooks>)

The Committee on Textbooks and Readers should report to the Executive Vice Chancellor and Provost or his designate because course materials are academic issues. Membership could include representatives from the Library, undergraduate and graduate students, DSP's Assistive Technology Teaching and Learning Center, faculty (Senate committee members and at-large faculty), Educational Technology Services, and the Division of Administration which oversees the Cal Student Store.

## **Appendices**

- A: People Interviewed by the Task Force
- B: Roster
- C: Data on Cal Student Store Textbook Adoption Rates
- D: Sample Publicity Flyer
- E: Comparison of Textbook Costs in Different Formats
- F: Selected References
- G: Provisions of the Higher Education Opportunity Act
- H: Tips for Students on Textbook Affordability
- I: Draft Questionnaire for Faculty

## **Appendix A**

### **People Interviewed by the Task Force**

Academic Senate Committee on Student Affairs

Catherine Candee, Executive Director, Strategic Publishing and Broadcast Initiatives, Office of the President

Brian Collins, Institutional Sales Consultant, John Wiley & Sons, Inc.

Anne De Luca, Registrar

Jeff Deutsch, Director, Cal Student Store

Sharon Farb, Associate University Librarian, UCLA (by telephone)

Michele Frasier, Assistant Dean, Boalt School of Law

Elizabeth Gray, Regional Manager in Training, Follett

Diane Harley, Research Associate, Center for the Study of Higher Education

Kevin Hegarty, Vice President and Chief Financial Officer, University of Texas, Austin

Other participants included in this meeting about the e-text Wiley pilot at UTA:

Ivy Anderson, Collections, California Digital Library

Bruce Sexton, California Association of Blind Students

Karla Gilbride, Disability Rights Advocates

Randy Jordan, Associate Director, Disabled Students' Program

Martha Velasquez, Alternative Media Services, Disabled Students' Services

Kevin Shields, Disabled Students' Residence Program, Disabled Students' Program

Sarah Hawthorne, Assistant Provost, Academic Compliance and Disability Standards

Paul Hippolitus, Director, Disabled Students' Program

Alex Kozak, Education Program Assistant, and Ahrash Bissell, Executive Director, ccLearn, Creative Commons

Nad Permaul, Director, ASUC Auxiliary

Mary Perry, Vice President Marketing Western Region, Follett

Ken Peterson and Kelly Gray, Textbook Managers, Ned's Books

Philip Stark, Professor, Statistics

David Stuckey, Manager Instructional Services, Haas Schools of Business (by telephone)

Martha Velasquez, Assistive Technology Teaching and Learning Center, Disabled Students' Program

Jay Zalewski, Group Vice President, Follett

Saffron Zomer, CalPIRG

## **Appendix B**

**Roster**  
**Joint Task Force on Textbook and Reader Affordability**  
**2009-10**

**Co-Chairs:**

Barbara Gross Davis  
Assistant Vice Chancellor—Equity and Inclusion

Dennis Lieu  
Chair, Academic Senate Student Affairs Committee  
Professor, Mechanical Engineering

**Members:**

Char Booth  
E-Learning Librarian

Ron Coley  
Associate Vice Chancellor—Business and Administrative Services

Frederick C. Collignon  
Professor Emeritus, City and Regional Planning

Chuck Eckman  
Associate University Librarian for Collections

Sherry Gong  
CalPIRG Representative

Lucy Greco  
Access Technology Specialist  
Disabled Students' Program

Brian Lu  
ASUC Representative

Samantha Lu  
Graduate Assembly Representative

Martha Olney  
Adjunct Professor, Economics

**Kate O'Neill**  
Associate Professor, Environmental Science, Policy, and Management

**Lisa Rothrauff**  
Manager, Training and Support  
Educational Technology Services

**Kifah Shah**  
ASUC Representative

**Tu Tran**  
ASUC Representative

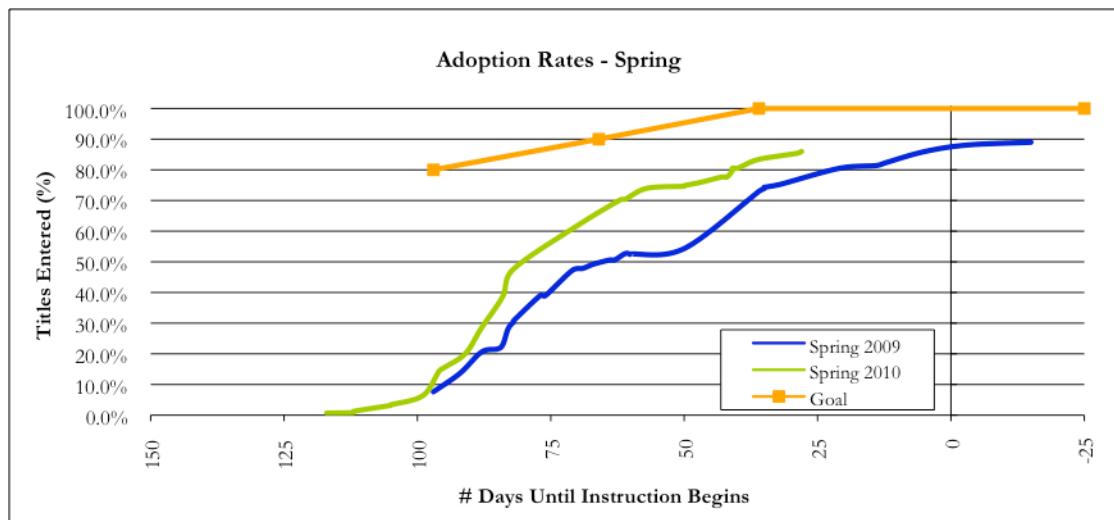
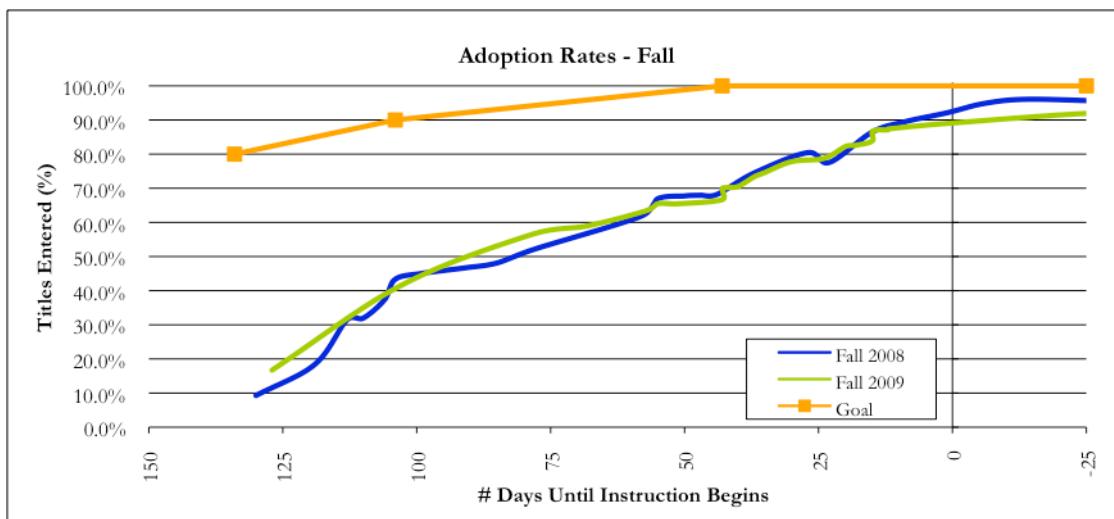
**Staff:**

**Jean Barker**  
Office of the Assistant Vice Chancellor – Equity and Inclusion

## Appendix C

### Data on Cal Student Store Textbook Adoption Rates

Fall 2008 through Spring 2010



**Appendix D**  
Sample Publicity Flyer

# ARE YOUR STUDENTS **CRUSHED** BY TEXTBOOK COSTS?

If you order spring 2010 textbooks by October 15, 2009, the Cal Student Store can locate more used textbooks, and also buy back books at higher prices.

**Contact:** Rich Berberian  
Senior Textbook Manager  
Phone: 642-9000, ext. 683  
E-mail: [text@berkeley.edu](mailto:text@berkeley.edu)



## Appendix E

### Comparison of Textbook Costs in Different Formats

The chart below shows the costs of popular textbooks in different formats from different retailers. Note that prices fluctuate and may be different at different times. Also note, the buyback policies:

#### Cal Student Store and Ned's Buyback Policy:

- Students get up to **50%** of the original price if the books are being used the following semester and **10%-30%** for those that are not needed, depending on the edition and conditions.
- Prices listed under “**Buyback**” assume text is used the next semester.

#### Amazon Buyback Policy:

- Students receive the exact quoted price for books that are sold directly to Amazon.
- **15%** commission will be paid to Amazon if the website is used to sell to other people.

#### Biology 1A (Biology, 8<sup>th</sup> Edition by Neil A. Campbell and Jane B. Reece)

##### Cal Student Store

Format	Price	Buyback	Total Cost
New Book	\$124.75	\$62.38	\$62.38
Used Book	\$93.75	\$46.88	\$46.88
Loose leaf	\$123.75	N/A	\$123.75

##### Ned's Book Store

Format	Price	Buyback	Total Cost
New Book	\$124.50	\$62.25	\$62.25
Used Book	\$93.50	\$46.75	\$46.75

##### Amazon.com

Format (excludes S&H)	Price	Buyback	Total Cost
New Book	\$109.95	\$82.93	\$27.02
Used Book	\$75.00	\$56.25	\$18.75

##### CourseSmart.com

Format	Price	Buyback	Total Cost
E-text	\$93.33	N/A	\$93.33

Format (excludes S&H)	Price	Buyback	Total Cost
Rental	\$49.91	N/A	\$49.91

**Math 1A (Single Variable Calculus: Early Transcendental, 6<sup>th</sup> Edition by James Stewart)****Cal Student Store**

<b>Format</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
Custom-New Book	\$61.50	\$30.75	\$30.75
Custom-Used Book	\$45.00	\$22.50	\$22.50

**Ned's Book Store**

<b>Format</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
Custom-New Book	\$61.50	\$30.75	\$30.75
Custom-Used Book	\$45.00	\$22.50	\$22.50

**Amazon.com**

<b>Format (excludes S&amp;H)</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
Full-New Book	\$135.17	\$79.80	\$55.37
Full-Used Book	\$75.00	\$41.25	\$33.75
Download to Kindle	\$95.36	N/A	\$95.36

<b>CourseSmart.com</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
E-text	\$89.99	N/A	\$89.99

<b>Chegg.com (excludes S&amp;H)</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
Rental	\$58.55	N/A	\$58.55

**Psychology 1 (Psychological Science, 3<sup>rd</sup> Edition by Gazzaniga, Halpern, and Heatherton)****Cal Student Store**

<b>Format</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
New Book	\$100.00	\$50.00	\$50.00
Used Book	\$75.00	\$37.50	\$37.50

**Ned's Book Store**

<b>Format</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
New Book	\$101.00	\$50.50	\$50.50
Used Book	\$75.50	\$37.75	\$37.75

**Amazon.com**

<b>Format (excludes S&amp;H)</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
New Book	\$91.78	\$51.75	\$40.03
Used Book	\$50.00	\$27.50	\$22.50

<b>Chegg.com (excludes S&amp;H)</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
Rental	\$43.19	N/A	\$43.19

**Economics 1 (Principles of Economics, 9<sup>th</sup> Edition by Case, Fair, and Oster)****Cal Student Store**

<b>Format</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
New Book	\$156.50	\$78.25	\$78.25
Used Book	\$117.50	\$58.75	\$58.75

**Ned's Book Store**

<b>Format</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
New Book	\$205.00	\$102.50	\$102.50
Used Book	\$155.00	\$77.50	\$77.50

**Amazon**

<b>Format</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
New Book	\$143.32	\$51.75	\$91.57
Used Book	\$102.00	\$56.10	\$45.90

**CourseSmart**

<b>coursesmart.com</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
e-text	\$89.78	N/A	\$89.78

**Chegg**

<b>chegg.com</b>	<b>Price</b>	<b>Buyback</b>	<b>Total Cost</b>
Rental	\$67.99	N/A	\$67.99

## **Appendix F**

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## **Appendix G**

### **Provisions of the Higher Education Opportunity Act (HEOA)**

The intent of this legislation is to provide students with time to shop around to get the best prices on textbooks; to make sure campus bookstores know by buyback time which books will be used in the following semester (to give students top dollar for their textbooks); to help students consider the costs of course materials when making decisions about which courses to take.

Beginning July 2010, all colleges and universities must:

- as practical, provide students with accurate course material information including ISBN and retail price
- include in any print versions of course schedules the URL address for the website that contains course material information
- work on cost reduction strategies
- inform students on how to save money on textbooks

Beginning July 2010, publishers must:

- give faculty textbook pricing information and let them know if the book is available in alternate formats
- offer unbundled course materials, unless they are bound by third party contract or the materials are designed solely as integrated materials
- provide general descriptions of changes that have been made in new editions so faculty can decide whether to assign the new edition

## **Appendix H**

### **Tips for Students on Textbook Affordability**

Textbook costs are a major concern for most students. You can reduce the amount you spend on course materials in a variety of ways:

- Use “View Books” (linked to the online Schedule of Classes) to find out before the semester begins the textbooks required for your courses. Check with your instructor, if possible, to confirm the books are required.
- Find out the availability of different formats for your textbooks (e.g., new, used, rental, electronic, loose-leaf) and comparison shop.
- Decide where to purchase or rent your textbooks: the Cal Student Store (note that the ASUC receives proceeds from the Cal Student Store to support student organizations and groups), other bookstores (such as Ned's), or online vendors (such as Amazon).
- Explore online websites that search for lowest priced copies of new and used textbooks. These include (<http://www.dealoz.com>), (<http://www.campusbooks.com>), (<http://www.cheap-textbooks.com>), among others.
- If you buy or rent online, try to use established, reliable vendors by reading users’ reviews, and make sure you are obtaining the correct version of the textbook (use the ISBN, which is typically located on the back cover by the bar code and on the copyright page). Also, keep in mind that shipping may entail extra costs and may take one to three weeks.
- When buying used books, check both online and brick-and-mortar sources. Consider buying used books from other Berkeley students, such as through the ASUC Bookswap (<http://www.asuc.org/bookswap/>) or Berkeley Book Exchange (<http://www.comegetused.com/>)
- Electronic versions of textbooks may be cheaper than hard copy books; these may be available from the Cal Student Store or other local stores, directly from publishers, and from e-vendors such as CourseSmart (<http://www.coursesmart.com>), a consortium of major textbook publishers.
- Check to see if your textbooks are on reserve at the library.
- Check to see if any of your friends have taken the course and if you can borrow the textbook.
- Ask the instructor if it is possible to purchase an earlier, less expensive edition of the textbook or an international edition.
- Be aware of return dates and policies if you wish to return what you purchased.
- Hold on to a textbook for an extra semester if it is from a course only taught once a year. The bookstore won't give top dollar if the book is not being used in the following semester. At the end of the next semester, the book can be bought back at a higher rate since it will be used in the coming semester.

## **Appendix I**

### **Draft Questionnaire for Faculty**

So that the Cal Student Store can improve its services and better meet the needs of instructors, we would be grateful if you would complete the following brief online survey by [date].

1. Which bookstore(s) are you placing your book orders with?

- Cal Student Store
- Ned's
- Analog books
- Amazon
- etc. (need list of all local bookstores)
- I don't use textbooks so I'm not placing an order with any bookstore
- I use a reader so I'm not placing an order with any bookstore
- I'm encouraging students to order materials online
- I'm distributing materials myself through course material fee
- I turn it in to the department representative and I don't know where it goes from there
- other, please describe

2. If you did not place your order with the Cal Student Store, please indicate why:

- prefer the bookstore indicated above (please describe why)
- have had bad experiences with the Cal Student Store in the past (please describe)
- students have complained about the Cal Student Store (please describe)
- see no advantage to working with campus bookstore
- missed the deadline and thought it was too late
- processes and procedures are too cumbersome
- textbook prices are too high compared to other places
- other (please describe)

3. Do you think you might place your orders with the Cal Student Store in the future?

- yes
- no (why not?)
- not sure

4. Please make other comments if you wish about the ordering process for books, the bookstore, textbook availability, and so on.

5. Please provide your name and contact information if you would be willing to be interviewed about the Cal Student Store.

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<sup>8</sup> Jeffrey R. Young, “Textbook Publishers Win Court Ruling Against File-Sharing Web Site.” *Chronicle of Higher Education*, February 24, 2010.

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<sup>11</sup> <http://www.govtrack.us/congress/bill.xpd?bill=s111-1714>

<sup>12</sup> <http://www.whitehouse.gov/open/documents/open-government-directive>

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<sup>14</sup> Michigan, p. 12.

<sup>15</sup> [http://www.leginfo.ca.gov/pub/09-10/bill/sen/sb\\_0001-0050/sb\\_48\\_bill\\_20091011\\_chaptered.pdf](http://www.leginfo.ca.gov/pub/09-10/bill/sen/sb_0001-0050/sb_48_bill_20091011_chaptered.pdf)

<sup>16</sup> [http://www.leginfo.ca.gov/pub/03-04/bill/asm/ab\\_2451-2500/ab\\_2477\\_bill\\_20040916\\_chaptered.pdf](http://www.leginfo.ca.gov/pub/03-04/bill/asm/ab_2451-2500/ab_2477_bill_20040916_chaptered.pdf)

<sup>17</sup> [http://www.leginfo.ca.gov/pub/07-08/bill/asm/ab\\_1501-1550/ab\\_1548\\_bill\\_20071013\\_chaptered.pdf](http://www.leginfo.ca.gov/pub/07-08/bill/asm/ab_1501-1550/ab_1548_bill_20071013_chaptered.pdf)

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<sup>19</sup> Jeffrey R. Young “How a Student-Friendly Kindle Could Change the Textbook Market.” *Chronicle of Higher Education*, May 6, 2009.

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<sup>32</sup> See <http://lib.berkeley.edu/find/types/books.html> for a list of eBook collections, and use the eJournal finder at [http://ucelinks.cdlib.org:8888/sfx\\_ucb/a-z/default](http://ucelinks.cdlib.org:8888/sfx_ucb/a-z/default) to search for online article content by journal name.

<sup>33</sup> From the US Copyright office: "The Copyright Office and the United States Patent and Trademark Office seek comment on possible solutions to enhance the accessibility of copyrighted works for the benefit of the blind or other persons with disabilities. Comments are specifically sought on the objectives and potential impact on existing U.S. law of a draft treaty prepared under the auspices of the World Blind Union and proposed formally at the May 2009 session of the World Intellectual Property Organization's Standing Committee on Copyright and Related Rights. Interested parties are invited to submit comments on the topics outlined in the supplementary information section of the Federal Register notice. Initial comments are due on or before November 13, 2009. Reply comments are due on or before December 4, 2009.

"For further information, go to the Copyright Office website at [www.copyright.gov](http://www.copyright.gov), click on "Federal Register notices," then "Copyright Office Notice of Inquiry and Request for Comments on the Topic of Facilitating Access to Copyrighted Works for the Blind or Other Persons With Disabilities; Notice of inquiry and request for comments, 74 FR52507 October 13, 2009, Version: PDF." (<http://www.copyright.gov/fedreg/2009/74fr52507.pdf>). Email from Gaeir Dietrich, Interim Director, High Tech Center Training Unit of the California Community Colleges, October 14, 2009.

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