

Metric 3 – Textbook Affordability Using the 5 Step Process

STEP 1. Universities shall start with a national average for books & supplies which has been the case since Metric 3 has been in existence and allows each university to have the same starting point. (This makes the final net cost number realistic - without attempting to be precise of the actual number).

STEP 2. Each university shall report to the Board of Governors the aggregated costs of the required textbooks by course section and term which can be obtained from their own campus bookstore. Each university shall also provide an inventory of open access materials per course section.

Costs associated in the calculation shall be undergraduate courses only and are as follows: Average New Price, Average Used Price, Average Rental Price, plus an additional column for Open Access Percentage. Costs are aggregated at the section level and if multiple books are required for one course section, then all book costs shall be added by price category. (See Price Category Definitions for cost inclusion).

Because some course sections require multiple books available in alternate formats, the average price for each item must be determined separately by adding the prices of all available formats and dividing by the count of those formats. Then, sum the calculated averages of all required items.

Average of Item = (format #1 price + format #2 price, etc.) / count of formats

Average Price = (average of item #1 + average of item #2, etc.)

Price Categories Definitions:

1. Average New Price = (average of new item #1 + average of new item #2, etc.)
2. Average Used Price = (average of used item #1 + average of used item #2, etc.)
3. Average Rental Price = (average of rental item #1 + average of rental item #2, etc.)
4. Open Access Percentage: percentage of students who can have access to the textbook materials free of charge. Calculated by dividing the number of required textbooks which are available for check out in the campus library, either digitally or in print by the total section enrollment. A value of 0 is applied to this column if the textbook is not available through any open access mechanism.

Note: The initial reporting submission shall be done through an ad-hoc data request from the Board of Governors using the Data Request System via the BOG portal. Once an established format has been decided upon by the Board of Governors for reporting these data points, this reporting shall be combined through the submission process for the Student Instruction File (SIF) by using the Instructional Activity table portion of the SIF. The Instructional Activity table portion of the SIF reports one row per course and section being taught for that particular submission time frame and costs could be reported during this process by adding additional columns (data elements). Through this methodology, the data then becomes verifiable and auditable for each term submission.

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STEP 3. Compute the average of all price categories as defined in STEP 2 for each distinct item of a course section. The average price for each item must be determined separately. If only 2 or 3 of the 4 categories are present, only compute the average based on the number of categories available. The course average is the sum of the average cost of each required item multiplied by one minus the Open Access Percentage. If at least one required item does not have a value in a price category, the course average for that price category cannot be computed.

STEP 4. Multiply the average of price categories computed in STEP 3 by the enrollment to find the section total cost. Multiply the course credit by the course section enrollment to find the student credit hours generated by the undergraduate courses. Total these for Fall term only and divide Course Total Cost by Student Credit Hours to determine the cost per credit hour for the Fall term. Complete the analysis for two Fall terms and calculate the % difference from one to the other.

STEP 5. Apply the % difference to the national average. Subtract the difference (of the national average minus STEP 3 average) to the value in STEP 1 if an improvement was recorded. The result is the plug in value to be used in the cost to a student measure. Applying the percentage difference to the national average prevents one institution from being disadvantaged against another as a result of their curricular mix.

Note: This would result in each university having an incentive to reduce book cost and also allows universities to receive credit for initiatives that reduce textbook costs (from any department). The HB7019 statute 1004.085 contains language associated with allowable "cost reduction" efforts to the student for books. The specific language comes from F.S. 1004.085 (7)(g) which states:

(g) Selection of textbooks and instructional materials through cost-benefit analyses that enable students to obtain the highest-quality product at the lowest available price, by considering:

1. Purchasing digital textbooks in bulk.
2. Expanding the use of open-access textbooks and instructional materials.
3. Providing rental options for textbooks and instructional materials.
4. Increasing the availability and use of affordable digital textbooks and learning objects.
5. Developing mechanisms to assist in buying, renting, selling, and sharing textbooks and instructional materials.
6. The length of time that textbooks and instructional materials remain in use.
7. An evaluation of cost savings for textbooks and instructional materials which a student may realize if individual students are able to exercise opt-in provisions for the purchase of the materials.

The described logic in the 5 STEP process can use the first 5 of these strategies effectively to reduce the cost of textbooks to the students.

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See the table below to show the potential quick improvements to metric 3.

BOOK COSTS CROSS-TAB	SCENARIOS					
	DEFAULT	#1	#2	#3	#4	#5
<i>% Improvement over prior Fall applied to national average</i>	0%	10%	20%	30%	40%	50%
COSTS PER SCH	\$40.00	\$36.00	\$32.00	\$28.00	\$24.00	\$20.00
COSTS PER 120SCH	\$4,800	\$4,320	\$3,840	\$3,360	\$2,880	\$2,400
COSTS PER 125SCH	\$5,000	\$4,500	\$4,000	\$3,500	\$3,000	\$2,500
COSTS PER 130SCH	\$5,200	\$4,680	\$4,160	\$3,640	\$3,120	\$2,600
Note: The \$40.00 books & supplies value is a proxy based on national data. This amount can potentially vary annually, or not. For now, the \$40 is a placeholder for illustrative purposes.						

Methodological Considerations:

- Consider undergraduate courses only.
- Average all formats of a required item regardless of whether the alternate format is coded as Required or Recommended.
- Only include courses for which adoptions were submitted to the bookstore or the bookstore was notified no textbook was required.
- Exclude Clickers and Calculators as they may be used for multiple courses through a student's curriculum.
- Remove 0 credit courses