

**Illinois College Course Materials Affordability and Equitable Access Collaborative Study**

**College Course Materials Affordability and Equitable Access (CCM) Task Force  
March 1, 2023**

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## Executive Summary

Public Act 102-0122 created the College Course Materials Affordability and Equitable Access Collaborative Study Act. The Act establishes a 23-member Governor- and General Assembly-appointed College Course Materials Affordability and Equitable Access (CCM) Task Force directed to conduct "a collaborative college course materials affordability and equitable access study" (the Study) to examine "the cost-saving methods and practices utilized by public and private institutions of higher learning in this State and throughout the United States for improving students' equitable first-day-of-class access to required course materials and conduct an affordability comparison of providing students' course materials, including digital learning tools." More specifically, the Study was statutorily required to cover 10 related areas of interest that are outlined in the Act; these were used to form the 10 Study Questions that provide the framework for the report.

To complete the Study and comply with the timelines in the Public Act, the Task Force developed a plan that included: conducting secondary research to collect any state and/or national data covering the various topics the Study was to address; surveying both public and private colleges and universities in Illinois and students at Illinois colleges and universities on college course materials; and providing discussion forums/presentations at the Task Force meetings with/from subject matter experts, schools, organizations, associations, groups, etc. on relevant topics related to college course materials.

The surveys of Illinois students and schools were substantial Illinois Student Assistance Commission (ISAC) and Task Force undertakings to assist in answering the Study questions. The survey of schools was developed and reviewed by task force members and sent to 123 schools, including all Illinois public universities and community colleges, the majority of private non-profit institutions, and a handful of proprietary schools. The request to complete the online survey was sent to academic leadership who were asked to work with the various staff needed to complete the data collection. A paper version of the survey was provided to assist with the collection of the data needed across the various areas within the institution. Seventy-seven of the schools surveyed, when asked about college course materials in the fall of 2021, responded to the College Course Materials School Survey, resulting in a 63 percent response rate. The sector and demographic breakdowns for respondents are similar to those breakdowns of the survey population.

The survey of Illinois students was developed by ISAC prior to the task force convening and was sent to the nearly 140,000 fall 2021 Monetary Award Program (MAP) recipients, representing more than a quarter of all Illinois college undergraduates. MAP is Illinois' large need-based college grant program for undergraduate students. MAP recipients are low-income students, who are more likely than Illinois undergraduates overall to be people of color and first-generation college students. About 8,800 students provided feedback on their fall 2021 course materials experience (about 7% of the total recipient population). Student survey respondents reflected the survey population, but were somewhat more likely to be independent, at a community college, first-generation, older, and female. Although this survey was not developed or reviewed by all task force members, the questions correlated with the 10 Study Questions.

Survey results by how the school respondents reported the majority of students obtained required course materials at the institution, as well as how student respondents indicated they obtained the majority of their required course materials, are shown throughout the report. The four course material model choices included: self-procurement only, campus-wide textbook rental program, campus-wide equitable access program, or a combination of self-procurement and

inclusive access (defined on pages 3 and 4). Some questions asked under the combination of self-procurement and inclusive access model pertained to materials obtained through self-procurement only (identified throughout the report as “self-procurement (with inclusive access)”), some pertained to materials obtained through inclusive access only (identified as “inclusive access”), and the remaining questions were overall, general questions asked about all materials obtained under this model (identified as “self-procurement and inclusive access”). When reviewing survey results please take into consideration, both campus-wide textbook rental program findings and campus-wide equitable access program findings are both based on responses from a small number of schools (6 each) and a smaller number of students. Additionally, all of those schools and students did not always answer all survey questions, and based on certain answers, there is some concern that students may not always have been clear under which model they obtained their required materials.

## Background

A 2005 United States Government Accountability Office (GAO) report, based on data supplied by the U.S. Bureau of Labor Statistics (BLS), indicated that new primarily print college textbook prices had risen at twice the rate of annual inflation over the course of nearly two decades, increasing at an average of six percent per year and following close behind increases in tuition and fees. A subsequent GAO report on college course materials in 2013 reported prices continued to rise from 2002 to 2012 at similar rates (College Textbooks, 2013). However, subsequent data from the BLS indicates that curve has plateaued the past few years. From July 2011 to March 2018, consumer retail prices for new college textbooks increased 40.6 percent. Despite some recent price increases, new college textbook prices have remained well below the rate of annual inflation for the last four and half years, while discounted options like Inclusive Access and Equitable Access not captured by the BLS feature significantly lower prices for students. (Cost of College, 2021).

National reports utilizing student survey data also show the decreasing trend in spending on college course materials. The average course material spend (purchased + rented course materials) per student was \$339 (\$38 per course) for the 2021-22 academic year. This was a decline of 26 percent compared to 2020-21 when students spent \$456 on course materials. The \$339 average course spend in 2021-22 is well below what students were spending just 5 years ago (\$576), and 51.6 percent less than what students were spending in 2007-08 (Student Watch, 2022). According to the National Association of College Stores (NACS), the reason for the spending drop is the increased use of free and lower-cost digital and rental materials (Mckenzie, 2017). Publishers have begun to shift more of their business models to e-texts and digital course materials, while still making print books available to students on a sale rental basis (Potts, 2021; Camera, 2019).

## Findings

The following findings represent data and information takeaways from answers to the 10 Study Questions in the Study, by topic.

### ***Current Landscape and Process for Obtaining Required College Course Materials, and Cost-Saving Options***

Efforts by the higher education community, publishers, and bookstores to make course materials more affordable for students have continued to emerge and expand and are comprised of campus-wide textbook rental and equitable access programs, program- or course-specific

inclusive access programs, open educational resources (OER), digital subscriptions, and zero-textbook-cost degrees (Potts, 2021; Update to the Report, 2021).

The majority of articles and research on cost-saving methods revolve around the movement to digital materials (less costly for publishers to produce), inclusive and equitable access programs, and OER. Many students are still obtaining some to all of their course materials through self-procurement, although the 2022 NACS *Student Watch* report indicated that 39 percent of students participated in an inclusive access program for at least one class during that academic year (Student Watch, 2022).

Generally, faculty, programs, and institutions decide what materials are required for college courses, and students must decide to pay for or otherwise obtain those materials to do well in college courses. Required course materials, per federal law, are identified in or linked from the course schedule. They may also be identified in a course syllabus and within the institution's learning management system (LMS), a comprehensive software application that facilitates the entire education course delivery process, and/or communicated through the student's institutional e-mail address, almost always prior to the start of the course(s). Faculty and/or the campus bookstore make the titles, authors, copyright, ISBNs, price, and other publication data available to students for required and recommended course materials. Students often have the options to purchase/rent materials through the bookstore, find the course resources on their own, use direct links provided by faculty and bookstore to OER and library or free online materials, use recommendations provided by faculty for accessing the materials, and/or simply not obtain their course materials at all. According to NACS Student Watch, around one in four students decided not to acquire at least one course material (Student Watch, 2022).

For most students, it's still typical that for each course, when presented with a list of required course materials, the student will have to decide how much they can spend on course materials. Additionally, they determine their preferred way of accessing information (digital or print). Students also consider whether to maintain access to the information permanently (rent or purchase), whether borrowing from another student creates too much conflict if the student is in the same course, and/or whether reading free "previews" or not obtaining access at all is sufficient to be able to perform well in the course. Although faculty, programs, and institutions intend for students to obtain all of their course materials by the first day of class, ultimately, students who are self-procuring their materials decide whether and when to obtain those materials. In all procurement methods, students who procure their course materials on their own are responsible for returning any rented print materials and may be able to sell a purchased print material to partially offset the initial cost.

Cost-saving options, often used by students who are self-procuring all course materials or in combination with materials obtained via inclusive access programs (see below), can include purchasing or renting used print course materials and/or choosing an e-book/digital rental format or a textbook subscription from a publisher, similar to renting an e-book, depending on what format(s) assigned materials are available. Whether a student can take advantage of some of these cost-saving methods can also depend on what programs are offered at each institution. **These methods generally fall into two categories: self-procurement or institution-provided.** In some cases, both categories may be present at an institution, depending on the course or program.

A **textbook rental program** is typically a campus-wide program, providing access to primarily print and/or possibly digital materials, with the cost usually included in tuition and fees

or a charge to the college bill. Movement toward providing digital rentals may be through an inclusive access program offered through a select course(s).

**Inclusive access** is a partnership between institutions of higher education and their campus bookstores, publishers, and/or digital course materials distributors, to deliver digital-first content on or before the first day of class, at prices that are below competitive market rates (Scotty, 2022). An inclusive access program can be offered by select course(s) or material with the cost assessed by course and usually included in tuition and fees or a charge to the college bill.

When inclusive access is used campus-wide or degree-wide, it is often referred to as an **equitable access program**. Materials provided through equitable access are often in a digital format but can be in a print format. The cost to the student for an equitable access program is usually included in tuition and fees or a charge to the college bill and can be assessed on a per credit hour basis or through an overall institutional program fee assessed per term. Inclusive and equitable access material costs are usually passed on to students, and content is created and revised by publishers, or OER creators and consumers.

It is important to note that inclusive access, equitable access, and OER are not mutually exclusive models “as a rule.” Inclusive access and equitable access programs can include OER in their programs, a coexistence that improves affordability overall while maintaining academic freedom to choose the materials most appropriate for the teaching faculty, academic departments, and institutions.

Students are informed as to how to obtain their required course materials through these models and when materials become available. This usually occurs prior to the start of the course. Additionally, students are informed on how to return rented print materials at the end of the course(s) and/or on how long they have access to electronic course materials. Additionally, for inclusive access and equitable access programs, students are informed as to how they can elect to opt-out if they do not want to procure their course materials through these programs.

Equitable access programs, like campus-wide rental programs, have existed for decades in Illinois and the U.S, as have negotiated discount course material programs like inclusive access. However, more institutions began to use inclusive access programs as digital content became more available and after a 2015 U.S. Department of Education regulation clarified the conditions under which a college could include the cost of books and supplies in the tuition and fee bills that could be paid by federal student aid (financial aid). Including course material costs in tuition and fees meant that payments, including financial aid, would be applied to cover these costs by default, and they would typically be paid at the time of enrollment or the drop/add deadline. When billed separately, the student is left to budget and pay for those expenses using the resources available to them (e.g., credit cards or cash) on their own timelines. To do this, in cases where books and supplies are available from a non-affiliated source, institutions must give students the option to opt out, and they must ensure materials are “available to students below competitive market rates.” Publishers can offer discounts with inclusive/equitable access because the volume sold is increasing. In these programs, materials must be cheaper than the retail price of equivalent materials, print or digital. Students enrolling in a participating class automatically receive access to the discounted materials with a typical opt-out period of the add-drop deadline for changing classes or around two weeks into the term (McKenzie, 2017).

The growth and development of **open educational resources (OER)** is one way to provide students free access to course materials. OER means a teaching, learning, or research

resource that is offered freely to users in at least one form and either resides in the public domain or has been released under an open copyright license that allows for its free use, reuse, modification, and sharing with attribution (Zaback, 2022). OER can range from supplemental content to entire textbooks. Students can access their OER course materials via website downloads, or materials can be provided by instructors through the campus LMS. Open educational resources are often paid for through grants and third-party funding, and content is created by instructors, institutions, and third parties.

Aside from methods of actually reducing course material costs, there are programs and policies in place to help students address the expense. Financial aid such as Pell Grants may be used for books, and targeted grants and scholarships for course materials may also be available for eligible students. Students and families may also be able to recoup course material expenses along with tuition and fees (up to \$2,500 per year) for the first four years of college by claiming an American Opportunity Credit on a tax return. A student and/or their family must be aware of these credits and their specific guidelines and must file a tax return (Publication 970, 2021).

### ***College Course Material Format Preferences and the Impact of COVID on Those Preferences***

Forty-two percent of all Illinois student survey respondents (all MAP grant recipients who are lower-income students) reported their preferred course material format was traditional print textbooks, 23 percent e-textbooks and interactive digital tools, and 35 percent indicated they don't have a preference, or it depends on the course. Top reasons for preferring traditional print textbooks/course materials included easier to maneuver to different pages/chapters (65%), like to write on/highlight a paper textbook (60%), and don't like reading digital textbooks (45%). Top reasons for preferring e-textbooks and/or digital tools included they are more convenient (73%), and/or either they are more cost effective and/or students like the search capability in an electronic format (50% each).

Sixty-four percent of all student respondents reported they were very likely (42%) or likely (22%) to switch to a digital course material format if there was a significant cost savings, 24 percent were somewhat likely, and 12 percent were unlikely (8%) or very unlikely (4%).

Eighty-seven percent of student respondents who were in college at the peak of the COVID pandemic (when most courses moved to remote learning) reported that the majority of their required course materials utilized technology or digital content during that time; those percentages were high regardless of how respondents maintained the majority of their course materials. Seventy-two percent of those respondents indicated they are now more likely to obtain required course materials that utilize technology or digital content. The percentages were high regardless of how the student obtained the majority of course materials, college generation status, or race/ethnicity.

More than half (53%) of all Illinois school survey respondents reported the format preference for required course materials for overall faculty at their institution is traditional print; 18 percent print with a digital component (e.g., access code, online access, support); 17 percent digital textbooks; and 12 percent digital textbooks with digital extras.

More than half (58%) of self-procurement only and self-procurement and inclusive access school respondents (representing 84% of all school respondents), and half or more of respondents by sector (except for proprietary schools with just one respondent to this question) reported that when most courses moved to remote learning at the peak of the COVID-19



pandemic, faculty at their institution, overall, more frequently required course materials that utilized technology or digital content. More than 80 percent of those respondents indicated they anticipate all (6%), many (47%), or some (29%) of those material format changes to remain long term.

### ***Faculty Academic Freedom in Selecting College Course Materials***

The majority of school respondents (73%) reported that faculty had the academic freedom to select whatever materials they wanted for their courses in the fall of 2021. Eight percent reported faculty have some influence in the selection of their course materials, but do not make the final decision, 3 percent that faculty use materials selected by others at the campus level, and 16 percent indicated some other faculty role in selection of their course materials, most often explained as a faculty role in selection that depends on academic department. Just two percent of all faculty at responding schools were using a textbook (print or digital) that they authored in the fall of 2021.

Although the largest proportion of respondents reported that faculty selected whatever materials they want for their courses regardless of how the majority of students obtain course materials, it varied from 40 percent for campus-wide textbook rental program respondents, to 55 percent for self-procurement and inclusive access program respondents, to 80 percent for campus-wide equitable access program respondents, to 86 percent for self-procurement only respondents. Twenty percent of both campus-wide textbook rental program respondents and campus-wide equitable access program respondents indicated that faculty have some influence in the selection of their course materials, but do not make the final decision, although 20 percent represents 1 school each. Also, 11 percent of self-procurement and inclusive access respondents (2 schools) reported faculty use materials selected by others at the campus level.

### ***How Illinois Students Obtained Required College Course Materials in the Fall of 2021***

The Illinois school survey results indicate students obtained required college course materials in the fall of 2021 through either:

- self-procurement only (59%, representing 209,240 undergrads);
- a combination of self-procurement and inclusive access (25%, representing 98,259 undergrads);
- a campus-wide textbook rental program (8% or 6 schools, representing 23,078 undergrads); or
- a campus-wide equitable access program (8% of 6 schools, representing 4,955 undergrads).

Similarly, 53 percent, 31 percent, 12 percent, and 4 percent, respectively, of the Illinois student survey respondents reported they obtained their required course materials through these methods in the fall of 2021.

Sixty-four percent of all school respondents reported OER are being used for at least some required course materials at their institution, with 68,767 undergraduates enrolled in a course that utilized OER in the fall of 2021, representing 21 percent of all undergrads at responding schools. The percentage of school respondents that reported OER are being used for at least some course materials varied by sector: 86 percent at community colleges, 33 percent at proprietary schools (1 school), 47 percent at private non-profit schools, and 90 percent at public universities. Similarly,

student survey results suggest approximately one-quarter of all respondents didn't have to obtain materials for at least one class because the materials were provided for free, possibly through OER.

### *Awareness and Interest in College Course Material Models*

Responses from school respondents about staff awareness of the different course material models within various areas of the institution suggested not everyone, even in areas that may be making decisions on course materials, are aware of the different models. Further, substantial percentages of respondents indicated they are unsure (22% to 39%) of the average percentage of overall staff/individuals in the various areas within the institution who are aware of the equitable/inclusive access program concepts and/or unsure (17% to 25%) of awareness of OER amongst staff in the various areas.

However, a number of Illinois schools are considering providing course materials through a campus-wide textbook rental or equitable access program, course- or program-specific inclusive access program, and/or through OER in the future. These methods often provide course materials via a digital format. The COVID pandemic impacted school consideration of these methods to varying degrees. Feedback from Task Force members indicated that all the course material models, to differing degrees, require staff time and resources to implement and maintain. It is important to note that six self-procurement only school respondents, when asked to provide additional thoughts related to college course materials and/or cost saving course material initiatives/best practices, indicated some trepidation in moving away from their current course material model. Concerns revolved around a different format being both more affordable and of comparable content and quality, limiting student choice, a digital-only format not appealing to students and/or faculty, and/or the difficulty in charging an across the board fee when course materials vary by program.

Seventeen school respondents (31%) indicated they are considering offering a campus-wide textbook rental program in the future, and of those, 19 percent reported the COVID pandemic contributed to their consideration. Comments mentioned most often by the 69 percent of school respondents not considering offering a campus-wide textbook rental program in the future were concerns around cost/staffing and around limiting student choice. Other comments mentioned by more than one respondent included that the school is not set up/ready to include the course material cost in tuition and fees; that there is too much variance in materials across programs/courses/disciplines; that students want to keep their books; and that students already have lots of options (including renting materials).

Twenty schools (55%) reported they are considering offering a campus-wide equitable access program in the future, and 19 schools (44%) indicated they are considering offering a course-specific inclusive access program in the future. About one-third of both groups reported the COVID pandemic contributed to their consideration to offer these programs in the future. Comments mentioned most often by the 46 percent not considering a campus-wide equitable access program and the 56 percent not considering offering course-specific inclusive access included they have not discussed this concept/are still researching this concept/have not looked into this concept/it is under consideration, they don't have the workforce/resources for this method, and/or they feel it is cost prohibitive.

Twenty-three schools (38% of respondents all respondents) indicated the COVID pandemic caused them to consider offering OER courses or offering more OER courses in the future.

Eighty-nine percent of inclusive access schools (16 schools) reported they are considering offering inclusive access for additional courses/materials in the future, and of those, 38 percent reported the COVID pandemic contributed to that consideration. Sixty-five percent of self-procurement and inclusive access program schools (11 schools) reported they are considering offering an equitable access program in the future, and of those, one school reported the COVID pandemic contributed to that consideration.

National student survey data also indicates the COVID pandemic impacted the college course materials experience. Many more students took online courses, and more utilized bookstores' online presence. Although purchasing and renting remained the primary ways students acquired materials, fewer students rented, more paid for digital materials, and more downloaded materials for free. More students rented materials from publishers, and relatedly, more students and schools utilized inclusive access. Format preference saw some change, with 44 percent of student respondents in Spring 2022 continuing to indicate they preferred some type of print materials down from 48 percent in Spring 2021 (whether it is traditional standalone print or print with additional digital components) (Student Watch, 2022).

### ***College Course Material Cost-Saving Initiatives***

Many school respondents reported they are providing financial aid and other resources to students to assist them in affording course materials:

- 95 percent are providing federal grant aid such as Pell Grants, which low-income students can use for other costs of attendance like course materials once tuition and fees are covered;
- 75 percent library or department textbook reserves;
- 66 percent emergency grant aid;
- 63 percent campus-based aid;
- 52 percent bookstore charging or book vouchers;
- 51 percent payment plans/deferred payments (i.e. veterans book check delays);
- 27 percent bookstore/textbook scholarship grants;
- 17 percent student book exchanges; and
- 10 percent counseling on applying for tax credits that may offset the cost of course materials.

Twenty-two percent of respondents indicated some other financial aid or resource, and some of those respondents commented on those other resources; most often mentioned were institutional aid or other scholarships; other assistance mentioned included using a textbook for multiple courses throughout a curriculum and negotiating better prices for course materials with vendors.

About 40 percent of all responding schools (31 schools) offered either a campus-wide textbook rental program (6 schools), a campus-wide equitable access program (6 schools) or program- or course-specific inclusive access (19 schools); in addition, 64 percent of school respondents (43 schools) reported OER are being used for at least some required course materials at their institution. Comments shared in the school survey and presentations given to the CCM Task Force indicate that schools consider some of those programs to be best practices in the area of course material access and affordability, including College of DuPage's textbook affordability initiatives focusing on OER utilization, Waubensee Community College's *MyMaterials* inclusive access program, Eastern Illinois University's Textbook Rental Service, and University of

Illinois Urbana-Champaign initiatives resulting from their 2020 College Course Materials Task Force.

Additional presentations to the Task Force from members and other subject matter experts highlighted best practices in implementing OER and inclusive access courses/models, and a presentation from the Midwestern Higher Education Compact (MHEC) covered a recent report that shares recommended practices for those who engage in OER efforts at the campus and university system levels to enable OER stakeholders and practitioners to calculate and communicate with more clarity and consistency the ROI of OER implementation.

Representatives from the Illinois Board of Higher Education (IBHE), the Illinois Community College Board (ICCB), and the College of DuPage highlighted many promising initiatives in the OER area currently underway in the Illinois higher education community. Illinois higher education leaders have attended MHEC's summit on OER implementation and policy to learn about progress in surrounding states, and they held an Illinois Community Colleges OER Summit to discuss institutional and statewide collaboration around OER. They have advanced collaboration and coordination in the OER area by joining a MHEC action team and working group, and they formed the Illinois OER Stakeholders Group. Late in 2021, ICCB and IBHE coordinated an Illinois Senior Leaders Seminar on Open Education with MHEC sponsorship and led by the Open Education Network (OEN). ICCB is supporting OER in the career and technical education (CTE) area, providing learning opportunities around OER, and has supplied grants to the Office of Community College Research and Leadership (OCCRL) to develop the "Fostering Access, Affordability, and Equity: A Primer on the Role of Open Educational Resources in Illinois Career and Technical Education" report (Spies, 2022).

A valuable resource is the Consortium of Academic and Research Libraries in Illinois (CARLI), a network led by the U of I System that makes open textbooks and other resources available to students through CARLI's 127 member libraries statewide, including all Illinois public universities, community colleges, 67 private colleges and universities, and 8 special research libraries. CARLI member libraries serve 90 percent of Illinois undergraduate students of whom 41 percent are students who identify as minorities. Open Illinois, an initiative of CARLI, encompasses grant management, membership in the Open Education Network, OER Commons, and continuing education programs for librarians and faculty/instructors. CARLI will administer Illinois SCOERs (Support for Creation of Open Educational Resources), a program that will provide access to open textbooks and personalized learning tools for entry-level courses in high-demand health care and human development career paths, funded by a \$1.08 million grant received in June 2021 from the U.S. Department of Education's Open Textbooks Pilot Program (Craig, 2022). Other Illinois colleges, like College of Lake County and College of Du Page, are partnering to expand OER utilization. Both participated in the OpenStax Institutional Partnership Program, a Rice University initiative committed to improving access to free, high-quality, peer-reviewed open educational resources ("College of Lake County," 2018; "College of DuPage", 2019).

Illinois campus stores also actively collaborate across the state with best practices in course material affordability, procurement and delivery through education and training provided by the Illinois Association of College Stores, the National Association of College Stores (NACS), and participation in the national Textbook Affordability Conference. NACS is working with the Council for the Advancement of Standards in Higher Education to establish institution and campus store higher education industry standards for course materials. Illinois stores also participate in buying and discount consortiums like shipping programs that help lower the costs for course materials. Bookstores are also a major student employer on campus and partner with academic departments on real world education and training.

Task Force members learned about OhioLINK's statewide affordable textbook initiatives for higher education, including Affordable Learning Ohio, a hybrid approach to course material access and affordability. It combines the use of library materials and adoption of OER to achieve the biggest cost reduction for students per course when compared with commercially published content, with inclusive access, an affordability model that can scale faster across more courses in more disciplines at more institutions. OhioLink is Ohio's statewide academic library consortium, connecting print and digital collections among its 90 member institutions (virtually all non-profit higher education institutions in the state) and managing statewide collaborative library and student success services. OhioLINK struck price agreements (not content purchases) at the statewide level (initially) with six major publishers for inclusive access commercial textbooks and courseware delivered through campus store managed programs. At the same time, OhioLINK promoted statewide OER adoption by providing an OER platform and expertise as a member of the Ohio Open Ed Collaborative, funded by a \$1.3 million grant from the Ohio Department of Higher Education. The hybrid approach resulted in dropping costs for over 90,000 students statewide for a total cost savings of over \$14 million dollars (or around \$155 in savings per student) in little more than a year (\$3,643,770 in savings resulted from OER and \$10,607,879 from inclusive access) (Evans, 2018; Evans, 2020).

### ***Some Students are Struggling with College Course Material Costs, Resulting in Negative Impacts***

It is important to note that despite the different course material formats and associated pricings available to students, and the various cost saving initiatives underway at schools, some students with the greatest financial need in the state are still not able to afford materials; not having those materials can have a negative impact. Eighty-three percent of all student respondents (all MAP grant recipients who are lower-income students) reported they consider college course materials, in general, to be overpriced; 11 percent were unsure; and 6 percent indicated they were not overpriced. Respondents who obtained materials through a campus-wide textbook rental program or equitable access program were less likely than respondents who obtained their materials through self-procurement only or self-procurement and inclusive access to have indicated they consider college course materials, in general, to be overpriced, 75 percent and 73 percent, compared to 85 percent and 84 percent, respectively. Additionally, 16 percent of the comments, or 96 comments, provided by students (the largest proportion of the nearly 600 comments provided by about 7% of all respondents) on anything additional they wanted to share with regard to their college course materials experience revolved around course materials being too expensive.

Forty-two percent of student respondents who obtained some to all required course materials through self-procurement (84% of all respondents) indicated the cost of course materials had a negative impact(s). Of those respondents,

- 16 percent reported they did not obtain a material due to cost;
- 14 percent took fewer courses;
- 10 percent earned a poor grade;
- 9 percent dropped or withdrew from a course;
- 8 percent avoided a certain major;
- 6 percent did not register for a specific course; and
- 4 percent failed a course.

Overall, 45 percent of all respondents (self-procurement only, campus-wide textbook rental or equitable access, or self-procurement and inclusive access) indicated they had to skip a purchase so they could afford course materials; some of the purchases forgone were for basic needs – 47 percent skipped food, 46 percent transportation expenses, and 26 percent some health-related expense.

Fifty-seven percent of school respondents strongly agreed (19%) or agreed (38%) that the majority of students are struggling to afford their required course materials. Agreement that students are struggling to afford their required course materials varied by how the majority of students obtain their course materials at the institution; 83 percent of equitable access program school respondents, 78 percent of self-procurement and inclusive access program respondents, 46 percent of self-procurement only respondents, and 40 percent of textbook rental program respondents strongly agreed or agreed that students are struggling to afford their required course materials.

Further, although more than half of school respondents (56%) indicated that the cost of course materials at their institution is about right and 5 percent that they are underpriced, nearly one-third (28%) reported that they are overpriced and 14 percent reported they are unsure about the cost of materials. Respondents commented on the variety of ways they made this determination. The largest proportion of self-procurement only schools (49%), equitable access program schools (67%), and self-procurement and inclusive access schools (67%) indicated that course materials at their institution are about right. The largest proportion of campus-wide textbook rental program schools (50%) reported course materials at their institution are underpriced. About one-third of self-procurement only school respondents reported course materials at their institution are overpriced, compared to 25 percent of campus-wide textbook rental program school respondents, 17 percent of campus-wide equitable access program school respondents, and no self-procurement and inclusive access program school respondents.

While about two-thirds of Illinois school survey respondents indicated that faculty, overall, are always aware (14%) or usually aware (52%) of the cost of course materials that they require for their courses, 30 percent reported faculty are sometimes aware and 5 percent that they are seldom aware. Nearly all school respondents (97%), regardless of how the majority of students at their institution obtained their course materials or their college sector, reported that if faculty, overall, were offered a course material format that could be a more affordable option for students, they would consider using it.

### ***Self-Procurement of College Course Materials***

Colleges where the majority of students obtain their course materials through self-procurement only or through self-procurement (with inclusive access) (84% of respondents) were asked about the setup of their college bookstore. The largest proportion of all respondents (40%) reported they have an institution-affiliated bookstore run by an outside entity (Barnes & Noble, Follett, etc.) with both a campus and online presence, followed by an institution-run bookstore with both a campus and online presence (24%).

Of the student respondents who procured their own materials, 63 percent reported that they obtained their materials through the campus bookstore, 51 percent from an online retailer like Amazon/Chegg/eBay, 25 percent directly from a publisher, and 19 percent from an off-campus bookstore. The number of school respondents, where students obtained some to all required course materials through self-procurement, providing an estimate for each of the formats/methods obtained through the campus bookstore, suggest that

- 100 percent of those schools utilized/offered new print purchase materials (49% of purchases) with an average cost per material of \$98;
- 98 percent used print purchase materials (14% of purchases) with an average cost of \$63;
- 95 percent digital purchase materials (16% of purchases) with an average cost of \$61;
- 88 percent new print rental (9% of purchases) with an average cost of \$49;
- 90 percent used print rental (11% of purchases) with an average cost of \$39; and
- 73 percent digital bundled subscription (2% of purchases) with an average cost of \$120 (would include access to multiple e-books and/or digital courseware).

Overall, new and used print purchases made up 63 percent of all acquisitions, and new and used print rentals made up 20 percent.

The topic of access codes (also referred to as “digital courseware”) was not specifically addressed in the surveys, but it was captured in either the percentage of school respondents who utilized/offered a campus bookstore new print and/or digital purchase (and reflected in the average costs per material format). Digital courseware is sometimes accessed through the use of access codes, and sometimes accessed directly through publisher and/or digital platform integrations with campus systems. Access codes are a series of characters used to unlock online e-books and courseware which includes online resources such as various assignment types, interactive study aids, personalized learning technology, videos, assessments, and student reporting. Instructors may ask students to obtain digital courseware, sometimes accessed via an access code, for resources that are required for the course. Although courseware typically contains both an e-book as well as many additional online resources, sometimes the option is provided for an access code to be included with the purchase of a new textbook at a discounted rate. The access codes can only be used once (to gain access to materials/resources for the authorized period of time); if a student purchased a used textbook or rented one, they will have to buy the access code separately. A small number of respondents, 27 students (nearly 5% of the 600 student comments provided by about 7% of the 8,800 total respondents), provided negative comments with regard to access codes in their student survey feedback. Most students indicated that required access codes drove up the cost of materials for those classes that required them (into the \$90 to \$120 range), and students asserted that they shouldn't have to pay to complete homework assignments for a course. Conversely, Task Force members heard from publishers and two Illinois college/university instructors (one Task Force member and one professor invited to join the meeting by publisher Task Force members) that the online tools and resources provided through access codes have been helpful for both students and instructors. According to both instructors, access codes allow for a more customized course experience, ensuring students are engaging and understanding the content, and in some cases have resulted in increased academic success.

A presentation by the National Association of College Stores (NACS) to the Task Force (and a few comments from school survey respondents) supported the role of the campus bookstore in managing complex logistics to ensure that course materials specified by professors are available before classes start in a wide variety of formats. Additionally, new course material discovery, selection, and price saving tools like adoption platforms, online and in store software platforms, mobile websites, QR codes, LMS integration, online marketplaces, price match guarantees, etc. are being utilized by campus bookstores nationwide (Hershman, 2022).

Cost savings resulting from the different choices offered through the campus bookstore can be estimated from the data provided by the 70 percent of all self-procurement and self-procurement (with inclusive access) school respondents (41 of 59 schools). It is important to remember that every format is not always available for every required course material. If all course materials had been purchased as new print textbooks, the cost would have been about \$31 million for students. The ability to purchase materials in the other formats - used print, digital, new or used rental, or digital subscription - resulted in an actual average cost of about \$24 million, and total cost savings of about \$7 million (about \$171,000 per school) for students. This estimate assumes a student obtains two e-books per digital subscription; more than that would result in greater savings. Similarly, if students could/would have made fewer new print purchases (schools reported 49% of purchases were for new print materials), the cost savings would have been higher. Students who obtained required course materials outside of the campus bookstore and were able to utilize cheaper material formats may have saved additional money on course materials.

The majority of student respondents who obtained all of their course materials through self-procurement only (53% of all respondents) provided cost data. The median cost per material was \$77, and \$300 in total, for the fall 2021 semester. The majority of respondents who obtained some of their course materials through self-procurement and some via inclusive access (31% of all respondents) provided cost data on the amount spent on self-procured materials as well. However, the data suggests that some students were confused on the cost of materials for their self-procured materials versus those they obtained via inclusive access. Additionally, a very small percentage (and number) of students who obtained materials through campus-wide textbook rental (12% of all respondents) or equitable access (4% of all respondents), or through inclusive access for a course(s), knew/provided their material(s) cost.

The majority (83%) of self-procurement only and self-procurement (with inclusive access) school respondents indicated they buy back select books that are purchased, 8 percent buy back all books that are purchased, and 8 percent do not buy back books that are purchased. The overall average buyback amount per textbook was \$28. However, of the student respondents who obtained some to all course materials through self-procurement, 84 percent reported they were not able to sell any of their course materials back.

Of those students who obtained some to all required course materials through self-procurement (84% of all respondents), 41 percent reported they had materials they were required to purchase (or rent) that they did not end up needing/using. Respondents at public universities and private non-profit institutions were much more likely than respondents at community colleges and proprietary schools to have reported obtaining required materials they did not end up needing/using: 49 percent and 45 percent compared to 33 percent and 27 percent, respectively. Ten percent of the comments, or 60 comments, provided by student respondents (of the nearly 600 comments provided by about 7% of the 8,800 respondents) on anything additional they wanted to share with regard to their college course materials experience revolved around required course materials being irrelevant or not used in the course.

Self-procurement only and self-procurement (with inclusive access) school respondents were asked how their institutional or affiliated bookstore (if they have one) course material prices compare, on average, to prices from online bookstores like Amazon Books, Chegg, eBay, etc. and/or textbook publishers. Overall, the largest proportion of respondents indicated their course material prices were about the same as those from online bookstores and/or textbook publishers, 45 percent and 46 percent, respectively. However, nearly one-third (28%) reported their course material costs were more expensive than online bookstore prices, and about one-fifth (19%)



indicated their prices were more expensive than publisher prices. Eight percent of respondents reported their course material prices were less expensive than online bookstore prices, and 17 percent indicated their prices were less expensive than publisher prices. Almost one of every five school respondents reported they were unsure how their course material prices compared to online bookstores or publisher prices.

Students who obtained some to all course materials through self-procurement were asked how easy or difficult it was, overall, to obtain those materials. Although a little more than half of respondents (53%) indicated the materials were very easy or easy to obtain, 34 percent reported they were neither easy nor difficult to obtain, and 13 percent indicated they were difficult or very difficult to obtain.

Thirty-five percent of self-procurement only and self-procurement (with inclusive access) school respondents reported they feel it is advantageous for course materials to be a separate expense for students, 19 percent do not, and nearly half (46%) reported they were unsure as to whether it is advantageous. Self-procurement (with inclusive access) respondents were much more likely than self-procurement only respondents to have indicated they feel it is not advantageous for course materials to be a separate expense for students: 44 percent compared to 8 percent. School respondents commented that course materials as a separate expense provides students with the choice to rent/borrow and/or obtain the materials at the lowest price (8 comments); that there are complexity issues in including a uniform course materials cost in tuition and fees due to the variability of materials (and their cost) by course or academic program, that it can be hard to return materials, and/or that sometimes a material is just recommended not required (7 comments); and that they need to do more research on the concept of including course material costs in tuition and fees (4 comments). On the flip side, three respondents each either commented that including course material costs in tuition and fees promotes first day access to materials and/or that it enables the use of financial aid for those materials. Two respondents suggested that the method can make it easier for students to obtain their materials.

Students who obtained printed course materials through self-procurement are also subjected to state and local sales taxes, which creates added costs, in some cases over 10%, for students. Students who obtained their materials through tuition and fees or digital materials are able to avoid such taxes on their required learning materials.

### ***Obtaining College Course Materials through Campus-Wide Textbook Rental or Equitable Access Programs or Course-Specific Inclusive Access***

School respondents with campus-wide textbook rental programs, campus-wide equitable access programs, or inclusive access were asked to estimate course material cost savings to undergraduates in the fall of 2021 resulting from utilizing these programs. About half of respondents utilizing each of these models (just 3 campus-wide textbook rental and 3 equitable access program schools) provided estimated cost savings to students. Additionally, respondents provided both overall and per student savings that required manipulation and used different self-procurement costs to calculate savings (new, average, print, digital, etc.). Due to wide variances, medians were calculated based on savings per student.

According to the data provided by school respondents, a median cost savings of \$650 per student was accomplished through a campus-wide textbook rental program, a median cost savings of \$200 per student was accomplished through a campus-wide equitable access program, and a median cost savings of \$42 per student was accomplished through inclusive access. The cost savings through inclusive access would be lower due to students only acquiring

materials for participating courses through that method versus all courses participating in the program like in campus-wide textbook rental and equitable access programs. These median cost savings multiplied by the number of students that school respondents indicated were using these methods result in cost savings through campus-wide textbook rental of about \$15 million (23,078 students times a median cost savings of \$650 per student); about \$991 thousand in cost savings through campus-wide equitable access (4,955 students times a median cost savings of \$200 per student); and about \$2.2 million in cost savings through program- or course-specific inclusive access (51,452 students times \$42 per student in cost savings). These savings do not factor in that these models are more likely to provide first-day access to materials and any impact this benefit could have on course success and cost savings. In addition, these cost savings only represent savings at the schools that responded to the survey.

Costs for the different course materials varied across how the majority of students obtain their materials at the institution. Four of the six campus-wide textbook rental program school respondents provided an average cost per print course material - \$62, and half provided an average cost per digital course material - \$74. Four of the six campus-wide equitable access program school respondents provided an average cost per print course material - \$96, and 5 of the 6 respondents provided an average cost per digital course material - \$76.

Twelve of the 19 inclusive access school respondents (63%) provided an average per e-textbook and interactive digital tools price (for inclusive access materials) - \$70. Nine of the 19 respondents (47%) provided an average per e-textbook and interactive digital tools with optional print upgrade price (for inclusive access materials) - \$79.

Although 62 percent of school respondents (campus-wide textbook rental and equitable access program respondents and inclusive access respondents) indicated prices, on average (compared to prices from the other sources available to students when offered in the same format), are less expensive (58%) or about the same (8%) as prices through an online bookstore (Amazon Books, Chegg, eBay, etc.), and 60 percent reported prices, on average, are less expensive (44%) or about the same (16%) as publisher prices, 25 percent indicated they are unsure how prices compare to online bookstore prices, and 32 percent indicated they are unsure how prices compare to publisher prices. Additionally, eight percent each (1 campus-wide textbook rental program respondent and 1 inclusive access program respondent for each comparison) reported their prices are more expensive than online bookstore and publisher prices.

Of those student respondents who obtained their required course materials through a campus-wide textbook rental program, equitable access program, or inclusive access program, 67 percent reported they were very satisfied or satisfied with those methods for obtaining their course materials; 27 percent were neither satisfied nor dissatisfied; and 6 percent were dissatisfied or very dissatisfied. Respondents who obtained their materials through the campus-wide programs were more likely to have been very satisfied or satisfied. Top reasons for being satisfied included knowing they would have all of the materials and correct editions (75%); obtaining the materials was easy and stress free (50%); having materials the first day of class (44%); and the convenience of not having to shop for materials (43%). Top reasons for being dissatisfied included the materials not being cheaper through the program (47%), and the material was not necessary (33%).

Sixty-seven percent of campus-wide equitable access program schools and schools offering inclusive access for a course(s) reported students have access to a course material for the length of their course only. One equitable access school indicated materials are available indefinitely, and two schools indicated "Other", identified as three years after graduation and

according to the publisher's terms. Other lengths of time specified by schools providing inclusive access included two years, 180 days, and that the majority of course materials have indefinite capabilities. There are multiple access options for varying lengths of time (including perpetual access) with different associated costs for materials obtained through equitable and inclusive access.

Eighty-nine percent of campus-wide textbook rental program school respondents, equitable access program school respondents, and inclusive access school respondents reported that the cost of course materials was included in students' tuition and fees cost/college bill.

Seventy-one percent of inclusive access school respondents, and all campus-wide textbook rental or equitable access program respondents, indicated they feel it is advantageous for course materials to be included in the cost of tuition and fees, and 29 percent of inclusive access school respondents do not feel it is advantageous. School respondents commented that course materials included in tuition and fees mean materials are available when students need them/when classes start (11 comments); enable financial aid/loans to be used for those costs and/or students are better able to plan/budget for what total colleges costs will be (7 comments); result in reduced cost/savings (4 comments); and/or streamline/simplify the process of obtaining course materials for students (2 comments).

### ***Obtaining College Course Materials through OER and Offering OER at an Institution***

Sixty-seven percent of all school respondents indicated they feel it is advantageous for students to have high-quality free course materials; 5 percent feel it is not advantageous; and 28 percent are unsure as to whether it is advantageous for students to have high-quality free course materials.

School respondents were asked to estimate course material cost savings to undergraduates in fall 2021 from utilizing OER. Just one each of both campus-wide textbook rental program respondents and equitable access program respondents (of the total 6 schools each) provided estimated cost savings, 13 of the 40 self-procurement only respondents (33%), and about half of self-procurement and inclusive access program respondents (10 of 19 schools) provided estimated cost savings. Additionally, respondents provided both overall and per student savings that required manipulation and used different costs to calculate savings (new, average, print, digital, etc.). Due to wide variances, medians were calculated based on savings per student.

According to the data provided by school respondents, an overall median cost savings of \$89 per student was accomplished through OER utilization, resulting in at least \$6.1 million in cost savings for the students that school respondents reported were enrolled in at least one course that utilized OER (68,767 students). OERs often provide first-day access to digital materials for students with ability to access digital materials. These savings do not factor in students obtaining print copies of OER, which can account for around 13 percent of students with an average cost of \$33 per book (Griffiths, 2020).

The majority of school respondents (71%) indicated OERs used are a combination of OERs developed by their faculty and OERs available on OER repositories. Five percent reported all faculty developed their own OERs, and 24 percent that all faculty used OERs available on OER repositories.

More than half of school respondents (53%) reported that students have access to OER course material indefinitely (or as long as they are available); 19 percent for the length of their

course only; 12 percent for as long as the student is enrolled at the institution; and 16 percent indicated some other length of time students have access to OER course materials, most often identified as varying by source of the OER material.

Forty percent of school respondents using OERs provided an estimated average cost to the institution of providing OER for required course materials for one course/class in fall 2021. Answers varied substantially, from \$0 up to \$60,000. The estimated overall average cost to the institution of providing OER for required course materials for one course/class in the fall of 2021, taking into account the staff time and resources, was nearly \$7,000 (with a median cost of \$500), but varied from \$534 (both the average and median cost of providing OER for one course/class) for a campus-wide textbook rental program respondent to an average cost for self-procurement only respondents of \$14,882 (and a median cost of \$1,750). It is important to note that although there is a cost associated with facilitating rental, inclusive access, equitable access and self-procurement models at an institution, these programs are self-funded through the margin which is calculated into the retail price. In addition, in many cases the bookstore acts as a profit center to assist in supporting institutional programs.

The national OER Degree Initiative launched by Achieving the Dream funded by several foundations, that promoted affordability and innovation at 38 community colleges across 13 states, offered 6,600 OER course sections reaching nearly 160,000 students. Approximately 2,000 instructors participated in the development and delivery of those courses, and nearly 600 courses were redesigned and certified as OER saving an average of \$65 per course. Launching OER courses demanded institutional efforts, and instructors bore the brunt of the workload. The OER courses took about 180 hours on average to develop, with a compensation cost (salary and benefits) of developing OER courses averaging \$12,600. Colleges invested a substantial amount of their own resources both directly and indirectly through staff and instructor time to develop OER programs. While implementation costs at institutions ranged from \$300,000 to \$1 million, an average cost of \$576,000 was spent over the 2.5 year period at five partner institutions that contributed detailed cost data (an average cost per student of \$70, which declined as enrollment in the OER courses increased – down to \$21) (Griffiths, 2020).

Overall reasons reported by schools respondents for not currently utilizing OER were time needed to develop and/or maintain OER (59%), cost to develop and/or maintain OER (48%), low interest from faculty (34%), system capabilities/accessibility/internet access (28%), lack of support for course design/implementation (24%), low interest from administration (10%), and/or language barriers (3%). Another 38 percent of respondents identified some other reason they are not currently utilizing OER. Most often mentioned was that the OER materials are considered lower quality or that OER are not available for the type of courses taught at the institution.

Several school respondents mentioned promising practices in the OER policy area: one has formed a committee to create and maintain OER repositories (time and money have been challenges); one has had conversations with other schools utilizing OER and identified some best practices; one has a team of faculty, staff, and administrators currently participating in the American Association of Colleges & Universities (AAC&U) OER Institute funded by the Hewlett Foundation who are proactively working on developing a large scale OER awareness campaign and OER adoption; and one established a taskforce in spring 2021 to explore textbook and course materials cost reduction with the purpose of exploring ways to create a pathway to OER development for faculty.

Eighty-four percent of respondents reported that either no institutional funding was dedicated to formal OER in academic year 2021-22 (67%), or \$1 to \$10,000 was dedicated (17%)

to OER. The remaining 16 percent indicated \$10,000 to \$25,000 (5%), \$25,001 to \$50,000 (3%), \$50,000 to \$75,001 (2%), or more than \$100,000 (6%, or 4 schools – 2 community colleges and 2 private non-profit institutions) was dedicated to OER. Further, 86 percent of respondents reported their institution has not been awarded grant funding from external sources for the explicit purpose of implementing OER. The 14 percent of respondents that reported they have received grant funding from external sources were all either self-procurement only schools (5 schools – 4 public universities and 1 private non-profit institution) or self-procurement and inclusive access schools (4 schools – 3 community colleges and 1 public university).

### ***First Day Access to College Course Materials***

The majority of school respondents (97%) and about two-thirds of student respondents (67%) strongly agreed or agreed that having required course materials by the first day of class (or shortly after) impacts academic success in the course, and 87 percent of school respondents strongly agreed or agreed it increases student retention. Eighty to 100 percent of school respondents regardless of how the majority of students at their institution obtain their course materials, either strongly agreed or agreed that students having their required course materials by the first day of class or soon after contributes to their academic success in the class and/or increases retention.

However, half of student respondents (all MAP grant recipients, so lower-income students), who self-procured all or some of their required course materials (84% of student respondents), reported they purchased the majority of those materials after the class(es) started. Two reasons for waiting revolved around affordability – 45 percent wanted to check other sources for a lower price, and 35 percent did not have the money to make the purchase(s). First-generation college respondents and Black and Hispanic/Latino respondents were more likely than respondents who were not first-generation college respondents or White and Asian respondents to have indicated they waited until after the first day of class to purchase any required course materials because they did not have the money to purchase the materials. Compared to national averages, it is less common for Illinois institutions to provide credit to students for their course materials on their bursar accounts; this may be a barrier for low-income students, who may otherwise have trouble obtaining materials on time because of financial aid paperwork delays (Hershman, 2022).

Schools offering inclusive access or a campus-wide textbook rental program or equitable access program were much more likely than self-procurement only and self-procurement (with inclusive access) to have indicated students always or usually have their required course materials by the first day of class or soon after: 89 percent, and 100 percent each, compared to 54 percent and 61 percent, respectively.

Ninety-three percent of school respondents reported students either always (45%) or usually (48%) have their required course materials provided through OER by the first day of class or soon after.

### ***Outcomes from Utilizing Campus-Wide Textbook Rental or Equitable Access Programs, Course-Specific Inclusive Access, and/or OER***

Research on the efficacy of various course material models' impact on affordability, student achievement, and completion is growing, but remains limited, particularly research conducted by independent researchers and evaluators who are not vested into a particular approach. What is undisputed is that student textbook costs and spending have significantly

declined over the last decade thanks to significant and diverse efforts outlined in this report. Despite these significant gains in affordability, such savings have been overtaken by increases in other more significant costs of attendance. It's also clear that new models of delivery are also increasing students' access to course materials in the beginning of classes, countering the situation where a number of students are waiting to obtain or forgoing materials.

Controlling for inputs and determining causality for student completion and achievement outcomes is particularly a challenge in education research. Recently, leaders in the OER movement have questioned much of the media comparison research on OER that has been done to date suggesting OER is as good as commercial materials and pointed towards the desperate need for improving research studies going forward (Wiley, 2022; Grimaldi, 2019).

Seventy-five to 80 percent of institution respondents, regardless of whether the majority of students obtained course materials through a campus-wide textbook rental or equitable access program, or through inclusive access (with self-procurement), strongly agreed or agreed that student affordability has improved, although the breakdown by strongly agreed and agreed varied. Schools were also asked about various outcomes resulting from those programs. However, substantial percentages indicated uncertainty in outcomes or a lack of time to determine sustainable trends. That said, about half of respondents believe student grades and retention have improved.

In keeping with the challenges with determining causality, of those school respondents utilizing OER, 16 percent agreed that student grades and student retention have improved as a result of OER utilization, and 84 percent neither agreed nor disagreed that student grades and student retention have improved. Seventy-seven percent of respondents strongly agreed (34%) or agreed (43%) that student affordability has improved as a result of OER use. The remaining 23 percent of respondents neither agreed nor disagreed that student affordability has improved.

Much of the recent national research around student outcomes centers around the inclusive access and OER concepts/models, and much of the research indicates positive impacts. Studies support the adoption and implementation of OER textbooks that have resulted in cost savings by making high-quality educational resources freely available to students in digital form. Other studies have found that high-quality OER can lead to significant financial benefits for students and/or institutions, as well as reduce the potential of financial debt; that the affordability of OER can effectively support at-risk learners in their efforts to finish their studies; that a majority of faculty and students perceive OER to be equal to, or better than, commercial textbooks in terms of quality; that students preferred using OER instead of traditional textbooks, citing the benefits of cost, access, and attributes of online textbooks; and/or that faculty rated OER equal or superior to traditional resources in terms of current content, ease of use, efficacy, trusted quality, and cost (Colvard, 2018; Perez, 2021).

A research and evaluation study of the OER Degree Initiative showed the initiative saved students at least \$10.7 million in instructional material costs (\$65 or more per student per OER course by eliminating the need to purchase commercial textbooks and other course materials). Evidence from 11 "research partner" colleges suggests that students who took multiple OER courses on average earned more college credits over time than otherwise similar students who took no OER courses, although this benefit did not vary significantly for underserved students versus other students. Students who took OER courses had similar cumulative GPAs as other students, on average. Even though instructors engaged in the OER initiative primarily to reduce financial burden on students and to ensure they had access to course materials, most reported that OER at least somewhat changed the way they presented and used materials in class,

increased the relevance of those materials, and influenced their pedagogical beliefs overall (Griffiths, 2020).

There are a number of studies on the impact inclusive access course material models have on student outcomes, and the majority of those studies found increases in success rates (earned a letter grade 'C' or better in course(s)) in total population or in population specific segments. Notably, for Black students, there were significant increases in success rates using inclusive access for course materials in all studies that found improvements, with increases in success rates (inclusive access versus self-procuring materials, and thus having course materials by the first day of class or soon after) ranging from +3.79 percent to +13.15 percent (Moore, 2022). Further, Moore's most recent research, *Equitable Access: A Participant v. Non-Participant Course Completion Rate Analysis*, examined the use of an equitable access course materials model and its impact on the course completion rates of participants and non-participants of the model at two, two-year institutions. Results of the study indicated statistical significance in all 11 demographic categories analyzed, including a 15.58 percent increase in the course completion rate in the total population and a 21.06 percent increase in the course completion rate for Black students when comparing participant and non-participant populations (Moore, Equitable Access, 2022).

The Task Force was charged with gathering a substantial amount of information. The Study has been an effort to show numerous different perspectives based on different school/student experiences related to college coursework materials. Additional research is likely required before Illinois schools and students can optimally leverage all of the college course material options available to improve student/institutional affordability while maintaining academic rigor and freedom. Hopefully this Study will give more direct stakeholders a significant step towards enriching the educational experience for all Illinois students – particularly populations representing historically-disadvantaged students.

# **Illinois College Course Materials Affordability and Equitable Access Collaborative Study**

## **Introduction**

Public Act 102-0122 created the College Course Materials Affordability and Equitable Access Collaborative Study Act. The Act establishes a 23-member Governor- and General Assembly-appointed College Course Materials Affordability and Equitable Access (CCM) Task Force, directed to conduct "a collaborative college course materials affordability and equitable access study" (the Study) to examine "the cost-saving methods and practices utilized by public and private institutions of higher learning in this State and throughout the United States for improving students' equitable first-day-of-class access to required course materials and conduct an affordability comparison of providing students' course materials, including digital learning tools." More specifically, the Study is to cover ten related areas of interest that are outlined in the Act, as well as Appendix A, and that were used to form the 10 Study questions that provide the framework for this report.

A list of the CCM Task Force members, including representatives from the Illinois Board of Higher Education (IBHE), the Illinois Community College Board (ICCB), the Illinois Student Assistance Commission (ISAC), several Illinois colleges and universities, college course material/textbook publishers, librarians, college bookstores, and other stakeholders, can be found in Appendix B. At the first meeting on March 28, 2022, Eric Zarnikow, the Executive Director of ISAC, was chosen by the members to chair the Task Force. The Act charges ISAC staff to provide administrative, technical, policy, and other support to the CCM Task Force.

Agendas and minutes for each task force meeting can be found in Appendix C, and links to any presentation materials used at those meetings can be found in Appendix D. Per the Act, draft findings of this Study are required to be reported to the Governor, General Assembly, and ISAC by October 1, 2022. After a public review period, a final report is due to those same parties no later than March 31, 2023.

To complete this Study and comply with the timelines in the Public Act, the Task Force developed a plan that included: developing research questions from the 10 areas which the Study is to cover to provide the framework for the report; conducting secondary research to collect any state and/or national data covering the various topics the Study is to address; conducting a survey of public and private colleges and universities in Illinois on college course materials (Appendix E); conducting a survey of students at Illinois colleges and universities on college course materials (Appendix E); and, providing discussions/presentations at the Task Force meetings with/from subject matter experts, schools, organizations, associations, groups, etc. on relevant topics related to college course materials (Appendix D).

The surveys of Illinois students and schools were substantial Task Force undertakings to assist in answering the Study questions. The survey of schools was sent to the 123 schools approved to provide Monetary Award Program (MAP) grants to students, which includes all Illinois public universities and community colleges, the majority of Illinois private non-profit institutions, and a handful of Illinois proprietary schools. MAP is Illinois' large need-based college grant program for undergraduate students. These schools represent about 800,000 Illinois undergraduate students, with about 580,000 of those students seeking certificates and degrees.

The survey aimed to collect feedback from schools that would help provide data for the various areas the Study required the Task Force to consider. Schools were asked to provide their



best answers/impressions because data actually quantifying and documenting the impact, costs, awareness, etc. of the various course material models may have been unavailable, too burdensome to collect, and/or would not be available in the time frame of the report. Schools were not running controlled experiments where they tested student outcomes based on whether they had materials on the first day of class. All are important to keep in mind when reviewing survey findings throughout the survey, and especially under Study questions 3 and 9.

According to the U.S. Department of Education's Integrated Postsecondary Education Data System (IPEDS), about 36 percent of all students at MAP-approved schools are Pell Grant recipients, 8 percent Asian, 13 percent Black or African American, 23 percent Hispanic/Latino, and 51 percent White. American Indian/Alaska Native and Native Hawaiian or Other Pacific Islander students each represent less than one percent of all students at MAP-approved schools. Whether a student is a first-generation college student is not reported in IPEDS.

Seventy-seven of the schools surveyed responded to the College Course Materials School Survey, resulting in a 63 percent response rate. The sector breakdown for respondents is nearly identical to the breakdown of the survey population: public universities made up about 13 percent of respondents (10 of the 12 responding), community colleges 38 percent (29 of the 48 responding), proprietary schools 4 percent (3 of the 4 responding), and 45 percent private non-profit schools (34 of the 59 responding). The demographic breakdown also appears very similar. School respondents represent about 336,000 undergraduates, or about 58 percent of all undergraduate students seeking certificates and degrees at schools surveyed. Sixty percent of school respondents reported 26 to 50 percent of their students were first-generation college students, 29 percent reported 25 percent or less, and 12 percent reported that more than 50 percent of their students were first-generation college students. Disaggregation by how the majority of students obtain required course materials at the institution is shown throughout this report. Those results should be viewed with caution, as both campus-wide textbook rental program findings and campus-wide equitable access program findings are both based on responses from 6 schools each, and all schools did not always answer all survey questions.

ISAC was able to include questions about the college course materials experience within the MAP Recipient Survey that is conducted biennially. The survey was sent to the nearly 140,000 fall 2021 MAP recipients, representing more than a quarter of all Illinois college undergraduates. The MAP recipient population are low-income students, who are more likely than Illinois undergraduates overall to be people of color and first-generation college students. More than 12,500 students completed the MAP Recipient Survey; about 8,800 of those respondents (about 7% of the total recipient population) answered the college course materials questions. Nearly 600 student respondents (about 7% of all students who completed the course material questions on the survey) provided comments when asked to share any additional thoughts they had on their college course materials experience. Summary points from those comments are included in the answers to the Study questions.

It is common to get about 10 percent to respond to a survey for a population of that size. Student survey respondents were somewhat more likely to be independent, at a community college, first-generation, older, and female than the MAP recipient population as a whole. Disaggregation by how students indicated they obtained required course materials at the institution is shown throughout this report. Some questions asked under the combination of self-procurement and inclusive access model pertained to materials obtained through self-procurement only (identified as "self-procurement (with inclusive access)"), some pertained to materials obtained through inclusive access only (identified as "inclusive access"), and the remaining questions were overall, general questions asked about all materials obtained under this

model (identified as “self-procurement and inclusive access”). Results should be viewed with caution, as both campus-wide textbook rental program findings and campus-wide equitable access program findings (and in some cases inclusive access findings) are based on responses from a smaller number of students, and there is some concern that some students may not always be clear on how they obtained their required materials.

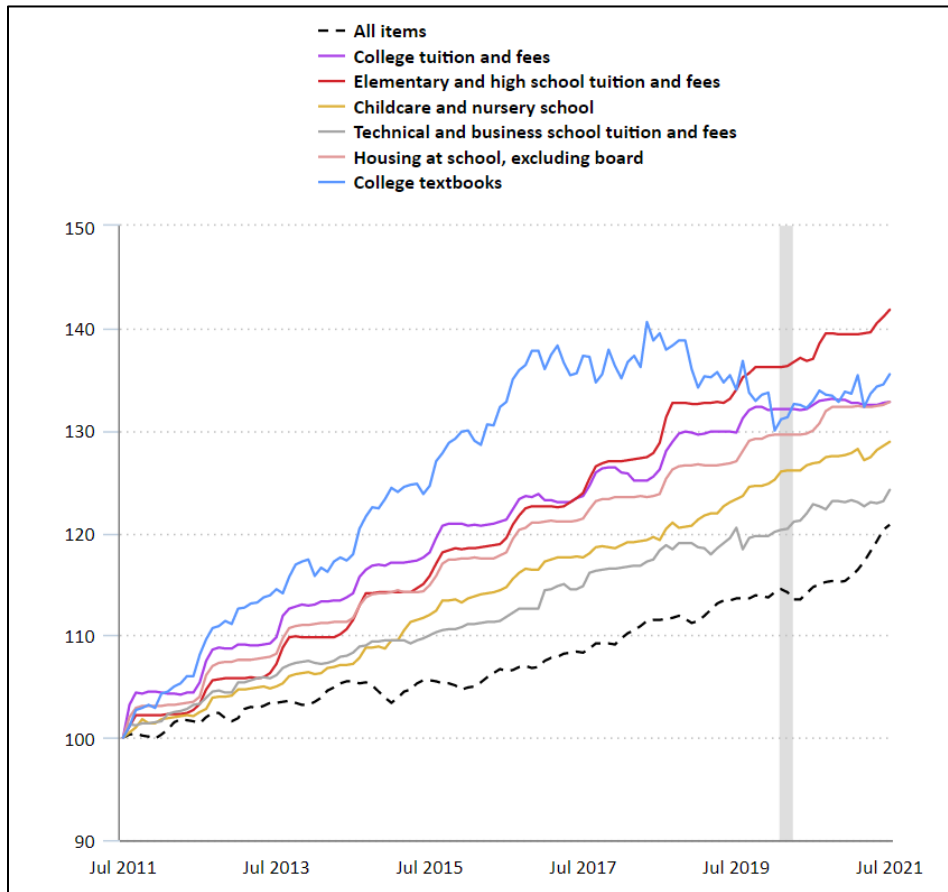
In addition to other studies and articles referenced throughout this report, data from the annual NACS’s *Student Watch* and *Faculty Watch* reports was utilized to provide a national perspective, as well as a touchpoint on the Illinois school and student survey results. *Student Watch* is based on feedback from nearly 12,000 students at 39 institutions nationwide, and investigates student buying behaviors for their course materials, preferred sources, and more (Student Watch, 2022). *Faculty Watch* was conducted across 19 two- and four-year institutions in the U.S. and Canada, with 1,650 responses, sharing faculty attitudes and behaviors toward course materials (Faculty Watch, 2022).

## **Background**

In 2005, the United States Government Accountability Office (GAO), utilizing U.S. Bureau of Labor Statistics (BLS) data, reported that new college textbook prices had risen at twice the rate of annual inflation over the course of nearly two decades, increasing at an average of 6 percent per year and following close behind increases in tuition and fees. In a subsequent report related to textbook costs in 2013, the GAO reported prices continued to rise from 2002 to 2012 at an average of 6 percent per year, while tuition and fees increased at an average of 7 percent and overall prices increased at an average of 2 percent per year (College Textbooks, 2013).

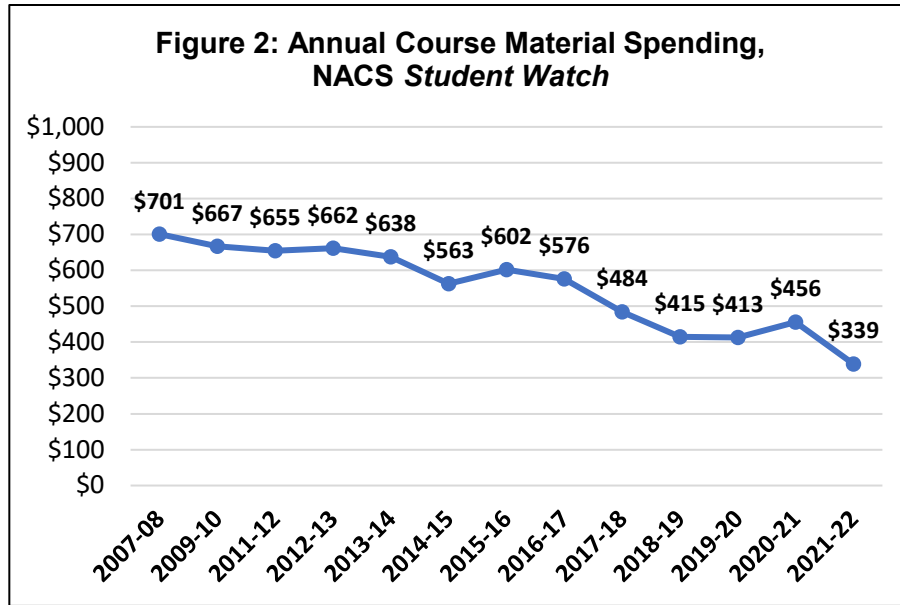
As Figure 1 from the BLS shows, that curve has plateaued the past couple of years. From July 2011 to March 2018, consumer prices for new college textbooks increased 40.6 percent. Despite some recent price increases following two years of deflation, new college textbook prices have remained well below the rate of annual inflation for the last four and half years (Cost of College, 2021).

**Figure 1: Consumer Price Indices for Tuition and School-Related Items, Not Seasonally Adjusted, July 2011-July 2021 (July 2011 = 100), U.S. Bureau of Labor Statistics**



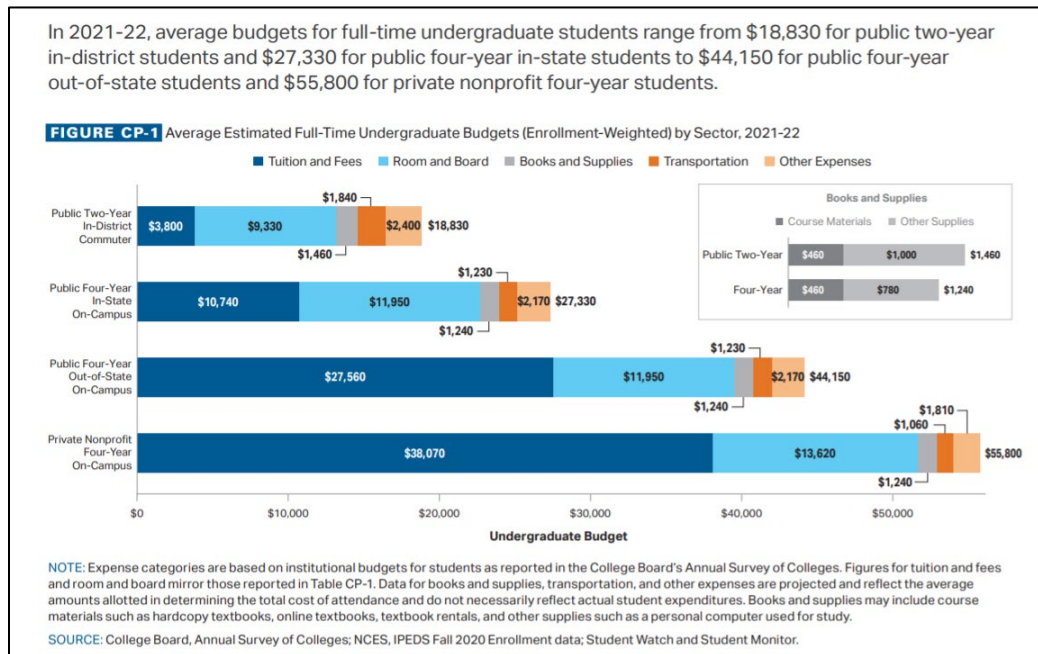
National reports utilizing student survey data also show the decreasing trend in spending on college course materials. As Figure 2 shows, the average course material spend (purchased + rented course materials) per student was \$339 (\$38 per course) for the 2021-22 academic year. This was a decline of 26 percent compared to 2020-21 when students spent \$456 on course materials. The \$339 average course spend in 2021-22 is well below what students were spending just 5 years ago (\$576), and 51.6 percent less than what students were spending in 2007-08 (Student Watch, 2022).

According to NACS, the reason for the spending drop is the increased use of free and lower-cost digital and rental materials as well as a number of other factors and initiatives of institutions and stores (Mckenzie, 2017). Student Monitor’s annual *Lifestyle and Media Study*, which also includes results from a national student survey, reported a similar course material spend in its latest findings of about \$56 per course material (Lifestyle & Media, 2020). Notably, the amount that students spend on course material remains influenced, in part, by academic major and discipline. Students majoring in the health and business professions currently pay the most for required course materials (Update to the Report, 2018).



Both reports that utilize student survey data are referenced in the College Board's nationally recognized, annual *Trends in College Pricing and Student Aid* report as the course materials cost in the larger "books and supplies" cost category that in addition to course materials also includes budgeting for supplies, and equipment, which in some cases includes an allowance for a personal computer used for study (see Figure 3 below). Although \$339 represents a relatively small proportion of the overall cost of attendance at any college sector, it does represent 9 percent of average, national tuition and fees at community colleges, and 3 percent at public universities, and is often an out-of-pocket cost for a student (Ma, 2021). Further, while course materials are a comparatively low expense relative to the cost of tuition and housing, the recent Chicago State University led, Equity Working Group for Black Student Access & Success in Illinois Higher Education Findings suggest emergency aid may be needed to help students with financial aid gain access to course materials to avoid a "barrier to college completion" (Equity Working, 2021).

**Figure 3: Student Budgets, 2021-2022, College Board  
Trends in College Pricing and Student Aid**



Course material costs trending down is good news, and it coincides with changes to the textbook model. Prior to the mid-2000s, the rough model for student expenditures was that approximately 65 percent of students purchased new print textbooks and 35 percent bought discounted used print textbooks from either the campus bookstore, or possibly another student. If a material was used for more than one semester and/or a new edition wasn't released by the publisher, students could sell back to the bookstore or to another student. Publishers released new editions every 3-4 years, with prices that were 12 percent higher on average. Five companies accounted for more than 80 percent of the publishing market (College Textbooks, 2005).

Advances in technology and the overall rising cost of getting a college degree, and more specifically, the rising cost for textbooks, influenced by increased sophistication of the secondary market, led to variations in the model. Publishers began providing supplemental materials with textbooks such as e-books, videos, adaptive/personalized learning assignments, application-based simulations, practices quizzes, etc., to help instructors address student's varying learning styles. They also offered multiple formats for delivery to provide options for students. One model "bundled" supplementary materials with a print copy of the textbook requiring students to purchase online subscriptions, access codes, or CDs, that often expired at the end of the semester. These could be helpful to faculty teaching large seminar courses with hundreds of students (Potts, 2021), but could also cost more than the textbook alone. Additional contributing factors included the decrease in the number of years in the revision cycle, the availability of used textbooks, and a general increase in production costs (Report of the College, 2012).

In response to the rising cost of required course materials reported by the GAO in 2005 and to ensure that students have access to information about selected course materials, the Higher Education Opportunity Act (HEOA) was updated in 2008 to include new provisions. Many states also introduced their own textbook-related legislation during this time period. The federal legislation required any institution receiving Title IV funds to the maximum extent practicable:

- provide students with accurate course material information, including the International Standard Book Number (ISBN) and retail price, for each course listed in the institution's course schedule;
- provide campus stores with course enrollment and textbook adoption information; and,
- work to disseminate information to students on campus-based initiatives to reduce the costs of course materials.

The HEOA also required publishers to:

- disclose course material information to faculty and staff, including the net (wholesale) price and packaging options; and,
- offer unbundled course materials, unless they are bound by third-party contracts or the materials that are designed solely as integrated materials.

The HEOA included other provisions to reduce students' textbook expenditures, such as increasing postsecondary reporting of book and supply cost data to more closely follow and report changes. A textbook rental pilot program was authorized and received \$20 million in funding. Additionally, an advisory commission and a competitive grant program were established to make course materials more accessible for students with disabilities (College Textbooks, 2013).

The Advisory Commission on Accessible Instructional Materials in Postsecondary Education for Students with Disabilities (AIM Commission) issued its report to Congress in 2011 making a number of recommendations to various stakeholders to address accessibility of course materials. One of the recommendations were for timely faculty adoptions, a recommendation that also ensures greater affordability of course materials (Report of the Advisory, 2011).

A follow-up study conducted by the GAO in 2013 reported that the publishers included in the study had disclosed the required textbook information, such as pricing and format options, and ensured components of bundled materials were made available individually, but that stakeholders interviewed indicated that these practices had little effect on faculty decisions. Faculty interviewed reported they became more aware of affordability issues, but they typically prioritized selecting the most appropriate materials for their courses over pricing and format considerations. Additionally, as required, the majority of schools provided textbook information online, and student representation reported benefiting from timely and dependable textbook information and increased transparency, and so that they had the time to comparison shop for their course materials before each academic term.

At this same time, the proliferation of new products, formats, and delivery channels gave students many options for obtaining course materials. For example, students could choose whether to realize savings upfront by selecting digital (e-book) or rental options, or on the back end by reselling books in the used book market (College Textbooks, 2013). Although a shift to digital could result in cost savings to the student, it has not always resulted in a reduction, as an instructor might opt for a digital textbook bundle that includes supplemental materials and/or a student may want a print version of a material instead of digital. Overall increased transparency has resulted in students and faculty making more informed choices contributing to the overall decline in student spending on course materials (Denson, 2022).

As noted in the 2013 GAO Report, around this time, colleges and universities as well as online companies expanded textbook rental options. Student PIRGS, in collaboration with NACS, released a guide to establishing textbook rental programs in 2005, followed by federal bicameral legislation introduced in 2005 to pilot textbook rental models. Chegg, Inc. and BookRenter.com, launched physical textbook rentals in 2007. By 2009 an estimated 300 institutions' bookstores

offered rental programs, which grew to nearly 3,000 institutions by 2013 (Hershman 2022). Amazon began offering online textbook rentals in 2012. Students began seeking out textbook rentals as an alternative to buying full price new or discounted materials from the campus bookstore (Potts, 2021).

Campus bookstores expanded services to provide students greater information and lower cost options. Most campus bookstores today provide students a choice between new, used, rental, digital options, and information on how to obtain materials at no cost such as open educational resources (OER) or library resources. Many institutions and bookstores have worked to negotiate sustainable lower cost and improved delivery models such as inclusive access and equitable access programs. New online and in-store software platforms, mobile websites, QR codes and integration with learning management systems (LMS) have been developed with the goal of enhancing the student customer experience. Single click opt-in and opt-out of negotiated lower cost options is typically available. More than 1,000 colleges and universities offer online marketplaces allowing students to shop online at the campus store and from a variety of online sellers simultaneously from the campus store's website. Several thousand stores also offer price match guarantees including matching the prices of Amazon and other online booksellers (Hershman, 2022).

Efforts by the higher education community, publishers, and bookstores to make course materials more affordable for students have continued to emerge and expand, including campus-wide textbook rental and equitable access programs, program- or course-specific inclusive access programs, subscription-based access programs, open educational resources (OER), and zero-textbook-cost degrees (Potts, 2021; Update to the Report, 2021).

Equitable access programs, like schoolwide rental programs found in Illinois, have existed for years if not decades, as have negotiated discount course material programs like inclusive access, however more institutions began to adopt these models to reduce costs and improve access after a 2015 U.S. Department of Education regulation clarified under what conditions institutions could settle tuition and fee bills with financial aid when including books and supplies in their tuition or fees bills. Instead of buying textbooks with credit cards or cash, students can be charged for course materials by the institution when they enroll. To do this, in cases where books and supplies are available from a non-affiliated source, institutions must give students the option to opt out, and they must have deals with publishers to ensure materials are "available to students below competitive market rates" (Mckenzie, 2017).

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A school-wide **textbook rental program or service** is typically a program providing access to primarily print and/or possibly digital materials, with the cost usually included in tuition and fees or a charge to the college bill. Movement toward providing digital rentals may be through an inclusive access program offered through a course(s). These programs differ from ala-carte or hybrid rental options a bookstore or other vendor may offer on a book-by-book basis.

An **inclusive access program** is a partnership between institutions of higher education and their campus bookstores, publishers, and/or digital course materials distributors, to deliver digital-first content on or before the first day of class, at prices that are below competitive market rates (Scotty, 2022). An inclusive access program can be offered by select course(s) or material with the cost assessed by course and usually included in tuition and fees or a charge to the college bill.

An **equitable access program** is a campus-wide program similar to inclusive access providing immediate access to typically digital materials at a negotiated discounted price, with the cost included in tuition and fees or a charge to the college bill assessed within tuition or on a per credit hour basis or overall institutional program fee

**Open Educational Resources (OER)** are teaching, learning, or research resources offered freely to users in at least one form and either reside in the public domain or have been released under an open copyright license that allows for their free use, reuse, modification, and sharing with attribution.

Students enrolled in a **zero-textbook-cost degree (z-degree) program** are provided with course materials at no cost. Using OER materials for all course materials within the program would be one way to cover the cost.

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It is important to note that inclusive access, equitable access, and OER are not mutually exclusive models “as a rule.” Inclusive access and equitable access programs can include OER in their programs, a coexistence that improves affordability overall while maintaining academic freedom to choose the materials most appropriate for the teaching faculty, academic departments, and institutions. All of these methods of obtaining college course materials are discussed in greater detail in Study Question 1 below.

To address the market changes, publishers began to shift their business models to digital textbooks and courseware. Pearson, the largest provider of college textbooks in the U.S. (followed by McGraw Hill Education, Cengage Learning, Macmillan Learning, and Wiley), announced in 2019 it would shift to a “digital first” strategy and begin moving its 1,500 U.S. print publications to e-book format, while still making print books available to students on a rental basis (Potts, 2021). Company officials say this shift will push the academic publishing industry into the 21st century and save students money by ending lengthy and expensive print revisions. Pearson noted that students can now purchase an e-book for about \$40, rent a physical book for about \$60 and purchase a suite of digital learning tools for around \$80. Going forward, Pearson plans to update its digital offerings on a regular basis, modeling itself after the video game industry, which allows for updates in real-time (Camera, 2019). Similarly, about five years ago, Cengage announced its strategic goal to be a 90 percent digital company by 2019. In addition to offering inclusive access



like other publishers, the company rolled out Cengage Unlimited, a first-of-its-kind subscription that gives students access to all the company’s digital higher education materials – e-books, courseware, study tools, writing guides, and college and career success resources – all for one price. Students save more money with each additional class that uses Cengage and faculty can customize their courses by using an unlimited number of digital materials. For students who prefer print textbooks, the Cengage Unlimited subscription includes at least four hardcopy textbook rentals for just the shipping and handling cost (Cengage, 2017).

National data, as well as the Illinois school and student survey findings, indicate that college students in credit-bearing courses continue to obtain most of their required course materials through self-procurement, either through purchasing, renting, borrowing individual materials, or accessing free materials, although program- or course-specific inclusive access is gaining ground (Student Watch, 2022). Materials could be new or used, a print or electronic book or material, or even a subscription to an electronic material(s) through a publisher, which would be similar to renting an e-book. For most students, it’s still typical that for each course, when presented with a list of required course materials, the student will have to decide their preferred way of accessing information (digital or print), whether to maintain access to the information permanently (rent or purchase), and more.

Figure 4, from the 2013 GAO report on textbooks, breaks the common options for college course materials down into 4 categories: Type, Format, Delivery Channel, and Transaction Method. Another newer transaction method, similar to renting, is a subscription to a digital book, and an interactive system known as digital courseware, both from publishers. Digital courseware is a fourth bullet point that should be added under “Format” in the GAO table below. These options may or may not be applicable if a student’s institution offers a campus-wide textbook rental program or equitable access program, a program- or course-specific inclusive access program, or OER for a course, program, or degree, depending on how the program is set up.

**Figure 4: Common Options for College Course Materials**

<b>Type</b>	<ul style="list-style-type: none"> <li>• Textbook</li> <li>• Supplemental material</li> <li>• Interactive system</li> <li>• Customized textbook</li> </ul>
<b>Format</b>	<ul style="list-style-type: none"> <li>• New print (including loose-leaf and other lower-cost options)</li> <li>• Used print</li> <li>• Digital book (including PDFs and books for e-readers)</li> </ul>
<b>Delivery channel</b>	<ul style="list-style-type: none"> <li>• Campus bookstore (online or physical store)</li> <li>• National online retailer</li> <li>• Other bookstore (not school-affiliated)</li> <li>• Open-source provider</li> <li>• Publisher</li> <li>• Library</li> <li>• Peer exchange</li> </ul>
<b>Transaction method</b>	<ul style="list-style-type: none"> <li>• Purchase</li> <li>• Rent</li> <li>• Borrow</li> <li>• Download free of charge</li> </ul>

Even with downward trending costs for course materials, some students continue to struggle with these costs, and in some cases either have to forego obtaining a required course material or forego some other expense so they can afford the course material. NACS 2022

*Student Watch* report shows 27 percent of students skipped obtaining at least one course material during academic year 2021-22, though only 15 percent of community college students indicated skipping obtaining one material. Students who skipped buying at least one material reported only saving \$24 on average (on their total required course material cost) compared to students who indicated they acquired all of their materials. Students skipping materials may be an indicator of students who will struggle in courses. Students were asked if they seriously considered dropping out during the 2021-22 academic year. Nearly one-third of students who had skipped obtaining materials said they had considered dropping out, compared to 21 percent of those who obtained all their materials (Student Watch, 2022).

A possible way to recoup some college expenses, including course material costs, is to claim an education tax credit on a tax return, although a student and/or their family must be aware of these credits and must file a tax return. There are two federal tax credits that can help offset the costs of college or career school by reducing the amount of income tax.

The American Opportunity Credit (AOTC) allows one to claim up to \$2,500 per student per year for the first four years of school for out-of-pocket expenses for tuition, fees, and required course materials whether acquired at the institution or elsewhere as the student works toward a degree or similar credential. The Lifetime Learning Credit (LLC) allows one to claim up to \$2,000 per student per year for any college or career school tuition and fees, as well as in very limited cases for books, supplies, and equipment that were a condition of enrollment the school.

For any year, only one of the credits can be claimed per student. There is no limit on the number of years the LLC can be claimed for each student, but the AOTC can only be claimed for the first four years per eligible student. Tax credits reduce the amount of income tax one may have to pay. Unlike a deduction, which reduces the amount of income subject to tax, a credit directly reduces the tax itself. The LLC is a nonrefundable credit. Forty percent of the AOTC may be refundable. This means that if the refundable portion of the credit is more than tax, the excess will be refunded. Both credits can't be claimed if modified adjusted gross income (MAGI) is \$90,000 or more (\$180,000 or more if joint return) (Publication 970, 2021).

## **Study Question Findings**

### **1. What are the college coursework material cost-saving methods available to students, including, but not limited to: inclusive access programs; textbook subscription programs; textbook rental programs; used textbooks; and other institutional textbook cost-saving methods, such as open educational resources?**

Efforts by the higher education community, publishers, and bookstores to make course materials more affordable for students have continued to emerge and expand, and include campus-wide textbook rental and equitable access programs, program- or course-specific inclusive access programs, open educational resources (OER), and zero-textbook-cost degrees (Potts, 2021; Update to the Report, 2021).

The majority of articles and research on cost-saving methods revolves around the movement to digital materials, which can be less costly for publishers to produce, inclusive and equitable access programs, and OER. Many students are still obtaining some to all of their course materials through self-procurement, although the 2022 NACS *Student Watch* report indicated that more than one-third of students (39%) participated in an inclusive access program for at least one class during that academic year (Student Watch, 2022).

Cost-saving options, often used by students who are self-procuring all course materials or in combination with materials obtained via inclusive access, can include purchasing or renting used print course materials and/or choosing an e-book rental format or a textbook subscription from a publisher, similar to renting an e-book. Whether a student can take advantage of some of these cost-saving methods can depend on what materials faculty select and what formats and programs are offered by each publisher and at each institution. These methods generally fall into two categories - self-procurement or institution-provided. In some cases, both categories may be present at an institution, depending on the course or program.

A school-wide **textbook rental program or service** is typically a campus-wide program, providing access to primarily print and/or possibly digital materials, with the cost usually included in tuition and fees or a charge to the college bill. Rental books may be housed at the college or university, or they may go back and forth between the college and the textbook provider. Movement toward providing digital rentals may be through an inclusive access program offered through a course(s). As publishers are moving away from print textbooks to digital, traditional print textbook rental programs are transitioning to equitable access programs, depending on how long a school/their faculty are willing to use a version of a print textbook.

**Inclusive access** (sometimes called *IncludeED*, *Follett Access*, or *First Day*) is a partnership between institutions of higher education and their campus bookstores and other departments on campus, publishers, and/or digital course materials distributors, to deliver digital-first content or in some cases print content on or before the first day of class, at prices that are below competitive market rates (Scotty, 2022). An inclusive access program can be offered by select course(s) or material, with the cost assessed by course and usually included in tuition and fees or a charge to the college bill. Typically, an institution will start with a pilot in several courses before scaling up.

When inclusive access is used campus-wide or degree-wide, it is often referred to as an **equitable access program**. The cost to the student for an equitable access program (such as *Follett Access* or *Barnes & Noble Complete*) can be included in tuition and fees or a charge to the college bill, and can be assessed on a per credit hour basis or through an overall institutional program fee. Inclusive and equitable access material costs are passed on to students, and content is created and revised by traditional textbook publishers and/or OER creators and consumers.

Increased use of inclusive access may have been precipitated by a 2015 Department of Education regulation that clarified under what conditions institutions could settle tuition and fee bills when including books and supplies with financial aid. Now, instead of buying textbooks with credit cards or cash, students can automatically receive course materials from the institution before the beginning of the term. To do this, institutions must give students the option to opt out when materials are available from other unaffiliated sources, and they must have negotiated agreements with publishers to ensure materials are “available to students below competitive market rates.” Publishers have moved quickly to diversify their inclusive-access offerings in the past few years. All offer digital versions of textbooks, which are often integrated into learning management systems through partner companies such as RedShelf or VitalSource. In addition, many publishers are also building new digital course materials from scratch and using their own proprietary platforms to distribute them. Publishers can offer discounts with inclusive/equitable access because their usage is increasing. In these programs, materials are lower than the retail price of equivalent materials, print or digital. Students generally have until the course add/drop period to opt out of the inclusive access material(s), which is around two weeks (McKenzie, 2017).

The growth and development of **open educational resources (OER)** is a way to provide students free access to course materials. OER means a teaching, learning, or research resource offered freely to users in at least one form and either resides in the public domain or has been released under an open copyright license that allows for its free use, reuse, modification, and sharing with attribution (Zaback, 2022). OER can range from supplemental content to entire textbooks. Students can access their OER course materials via websites, downloads, or they can be provided by instructors through the campus learning management system or in some cases in print format. Open educational resources are often paid for through grants and third-party funding, and content is created by instructors, institutions, and third parties. Open educational resources and their support and maintenance are often paid for through grants, third-party funding, and/or tuition and fees. Content is created by instructors, institutions, and third parties such as publishers or the government.

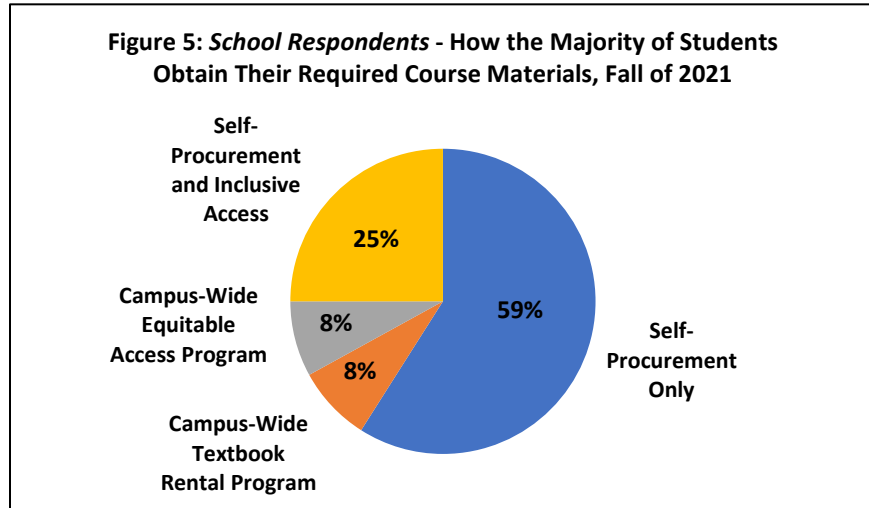
Students enrolled in a **z-degree program** are provided with course materials at no cost. This cost-saving method was not mentioned much in the literature. This method could be costly and/or labor intensive to obtain/produce materials for an entire program that would be free to the student. Using OER materials for all course materials within the program would be one way to offer this kind of program; otherwise the cost would have to be covered by someone other than the student such as a last dollar free college scholarship program.

It is important to note that despite the different course material formats and costs available to students, some students are still not able to afford them. Not having those materials can have a negative impact on student performance. Forty-two percent of Illinois student respondents (all MAP recipients, who are lower-income students) who obtained some or all required course materials through self-procurement (84% of all respondents) indicated the cost of course materials had a negative impact(s). First-generation (44%), Hispanic/Latino (45%), and Black (43%) respondents were somewhat more likely than respondents who are not first generation (39%), Asian (40%), or White (41%) to have indicated the cost of course materials had a negative impact.

Of all respondents who indicated the cost had a negative impact, 16 percent reported they did not obtain a material due to cost, 14 percent took fewer courses, 10 percent earned a poor grade, 9 percent dropped or withdrew from a course, 8 percent avoided a certain major, 6 percent did not register for a specific course, and 4 percent failed a course. Overall, 45 percent of all respondents (self-procurement, campus-wide textbook rental or equitable access, or self-procurement and inclusive access) indicated they had to skip a purchase so they could afford course materials; some of the purchases forgone were for basic needs – 47 percent skipped food, 46 percent transportation expenses, and 26 percent some health-related expense. Fifty-two percent indicated they skipped saving or debt reduction, which could have included paying down student loans, 50 percent a clothing purchase, 44 percent an “other” education expense, 42 percent recreation, and 6 percent childcare.

The Illinois school survey results indicate the majority of students obtained required college course materials through either self-procurement only (59%, representing 209,240 undergrads) or a combination of self-procurement and inclusive access (25%, representing 98,259 undergrads), and 8 percent each (6 schools each, representing 23,078 and 4,955 undergrads, respectively) through a campus-wide textbook rental program or through a campus-wide equitable access program, in the fall of 2021.

**Figure 5: School Respondents - How the Majority of Students Obtain Their Required Course Materials, Fall of 2021**



There were some variances in how the majority of students obtained their college course materials by sector. Public university and private non-profit institution respondents had similar percentages that reported the majority of students obtained their materials through self-procurement only (70% and 69%, respectively), but private non-profit respondents were somewhat more likely than public university respondents to have reported the majority of students obtained their materials through self-procurement and inclusive access (17% versus 10%). Twenty percent of public universities and six percent of private non-profits indicated they have campus-wide textbook rental programs (2 schools each), and no public universities and 9 percent of private non-profits (3 schools) reported they have campus-wide equitable access programs.

Although 90 percent of community college respondents indicated the majority of students obtained materials through self-procurement only (52%) or self-procurement and inclusive access (38% - 11 schools), community colleges were more likely than public universities and private non-profits to offer inclusive access. Sixty-seven percent of proprietary respondents (2 schools) reported the majority of students obtained materials through a campus-wide equitable access program, and the other proprietary respondent (33%) indicated the majority of students obtained materials through self-procurement and inclusive access. Similarly, the Illinois student survey results indicated the majority of students obtained their required course materials through either self-procurement only (53%) or a combination of self-procurement and inclusive access (31%), a campus-wide textbook rental program (12%), or a campus-wide equitable access program (4%), in the fall of 2021.

There were a few variances in the percentages of undergraduates falling within the ranges (provided by school respondents) for receipt of a Federal Pell Grant, college generation status, and race/ethnicity by sector. Sixty-two to 70 percent of respondents in each sector reported between 26 and 50 percent of their undergraduates were Pell recipients. The largest proportion of respondents at community colleges, private non-profits, and public universities indicated 26 to 50 percent of their undergraduates were first-generation college students. The one proprietary respondent (of 3 responding) that provided data on this population indicated 51 to 75 percent of their undergraduates were first-generation college students. Ninety to 94 percent of community college, private non-profit, and public university respondents reported 25 percent or less of their undergraduates were Black, while 67 percent of proprietary respondents (2 of the 3 responding schools) reported 26 to 50 percent of their undergraduates were Black. Sixty-seven percent of proprietary school respondents (2 of the 3) reported 26 to 50 percent of their undergraduates

were Hispanic/Latino, compared to 29 percent for community college respondents, 27 percent for private non-profit school respondents, and 10 percent for public university respondents.

Sixty-four percent of all school respondents reported OER are being used for at least some required course materials at their institution, with 68,767 undergraduates enrolled in a course that utilized OER in the fall of 2021, representing 21 percent of all undergrads at responding schools. The percentage of school respondents that reported OER are being used for at least some course materials varied by sector: 86 percent at community colleges, 33 percent at proprietary schools (1 school), 47 percent at private non-profit schools, and 90 percent at public universities. Similarly, student survey results suggest approximately one-quarter of all respondents didn't have to obtain materials for at least one class because the materials were provided for free, possibly through OER.

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Colleges where the majority of students obtain their course materials through self-procurement only or self-procurement (with inclusive access) (representing 84% of respondents) were asked about the setup of their college bookstore. The largest proportion of all respondents (40%) reported they have an institution-affiliated bookstore run by an outside entity (Barnes & Noble, Follett, etc.) with both a campus and online presence, followed by an institution-run bookstore with both a campus and online presence (24%), institution-affiliated bookstore run by an outside entity (Barnes & Noble, Follett, etc.) with an online presence only (10%), and an institution-run bookstore with an online presence run by an outside entity (7%).

**Table 1: School Respondents - The Setup of College "Campus" Bookstore**

	Overall	Self-Procurement Only	Self-Procurement (with Inclusive Access)
Institution-run bookstore with both a campus and online presence	24%	18%	39%
Institution-run bookstore with an online presence ran by an outside entity	7%	8%	6%
Institution-affiliated bookstore run by an outside entity (Barnes & Noble, Follett, etc.) with both a campus and online presence	40%	48%	22%
Institution-affiliated bookstore run by an outside entity (Barnes & Noble, Follett, etc.) with an online presence only	10%	8%	17%
Neither an institutional nor affiliated (Barnes & Noble, Follett, etc.) bookstore	10%	13%	6%
Other	9%	8%	11%

The largest proportion of community college respondents (45%) reported they have an institution-run bookstore with both a campus and online presence (compared to 10% of private non-profits and 25% of public universities), whereas the largest proportion of private non-profit (35%) and public university (63%) respondents reported they have an institution-affiliated bookstore run by an outside entity (Barnes & Noble, Follett, etc.) with both a campus and online presence (compared to 40% of community colleges). Another 21 percent of private non-profit institution respondents indicated they have neither an institutional nor affiliated (Barnes & Noble, Follett, etc.) bookstore, and 14 percent reported they have an institution-affiliated bookstore run

by an outside entity (Barnes & Noble, Follett, etc.) with an online presence only. The one proprietary school (of the 3) that provided feedback on their bookstore setup indicated they have an institution-affiliated bookstore run by an outside entity (Barnes & Noble, Follett, etc.) with an online presence only.

Seventy percent of all self-procurement and self-procurement (with inclusive access) school respondents (41 of 59) provided the estimated number of required course materials purchased and/or rented through various methods through their campus bookstore setup. The number of schools providing an estimate for each of the methods suggest that respondents utilized/offered new print purchase materials (49% of all purchases), 98 percent used print purchase materials (14% of all purchases), 95 percent digital purchase materials (16% of all purchases), 88 percent new print rental (9% of all purchases), 90 percent used print rental (11% of all purchases), and 73 percent digital bundled subscriptions (2% of all purchases). However, it is possible that a responding school did not provide an estimate for one of the methods because data was not available for a particular format.

Eighteen percent of all school respondents reported the format preference for required course materials for overall faculty at their institution was print with a digital component (e.g., access code, online access, support), and 12 percent digital textbooks with digital extras (which could include digital courseware/access codes). Other than that, the topic of access codes (also referred to as “digital courseware”) was not specifically addressed in the surveys, but captured in either the percentage of school respondents who utilized/offered a campus bookstore new print and/or digital purchase (and reflected in the average costs per material format). Digital courseware is sometimes accessed through the use of access codes, and sometimes accessed directly through publisher and/or digital platform integrations with campus systems. Access codes are a series of characters used to unlock online e-books and courseware which includes online resources such as various assignment types, interactive study aids, personalized learning technology, videos, assessments, and student reporting. Instructors may ask students to obtain digital courseware, sometimes accessed via an access code, for resources that are required for the course. Although courseware typically contains both an e-book as well as many additional online resources, sometimes the option is provided for an access code to be included with the purchase of a new textbook at a discounted rate. The access codes can only be used once; if a student purchased a used textbook or rented one, they will have to buy the access code separately.

A small number of respondents, 27 students (nearly 5% of the 600 student comments provided by about 7% of the 8,800 total respondents), provided negative comments with regard to access codes in their student survey feedback. Most students indicated that required access codes drove up the cost of materials for those classes that required them (into the \$90 to \$120 range), and students reported they shouldn't have to pay to complete homework assignments for a course. Conversely, Task Force members heard from publishers and two Illinois college/university instructors (one Task Force member and the other one was a professor invited to join the meeting by publisher Task Force members) that the online tools and resources provided through access codes have been helpful for both students and instructors. According to both instructors, access codes allow for a more customized course experience, ensuring students are engaging and understanding the content, and in some cases have resulted in increased academic success.

Overall, new and used print purchases made up 63 percent of all acquisitions, and new and used print rentals made up 20 percent. Digital purchases made up a higher percentage of the total purchases and/or rentals at self-procurement (with inclusive access) schools than at self-

procurement only schools (28% vs. 11%), while all other percentages were lower. The percentage breakdowns of materials purchased or rented for community college and public universities were similar and looked a lot like the overall percentage breakdown. Private non-profit school respondents reported fewer new print purchases (38%) and more used print rentals (20%) than overall respondents. The one proprietary school that provided data reported 38 percent new print purchases and 62 percent digital purchases.

**Table 2: School Respondents - The Number of Required Course Materials Purchased and/or Rented Using the Following Six Methods Through the Institutional or Affiliated (Barnes & Noble, Follett, etc.) Bookstore for Undergraduate Students in the Fall of 2021**  
(Average per school shown and all purchased as a % of overall total)

	Overall	Self-Procurement Only	Self-Procurement (with Inclusive Access)
Campus Bookstore New Print Purchase (Self-Procurement Only n=27 and Self-Procurement and Inclusive Access n=14)	<b>3,649/49%</b>	4,008/50%	2,957/47%
Campus Bookstore Used Print Purchase (n=26 and 14)	<b>1,083/14%</b>	1,311/16%	581/9%
Campus Bookstore Digital Purchase (n=25 and 14)	<b>1,277/16%</b>	943/11%	1,783/28%
Campus Bookstore New Print Rental (n=22 and 14)	<b>912/9%</b>	988/10%	468/7%
Campus Bookstore Used Print Rental (n=23 and 14)	<b>1,046/11%</b>	1,160/12%	485/8%
Digital Bundled Subscription (i.e. Cengage Unlimited) (n=16 and 14)	<b>185/2%</b>	243/2%	52/1%

Of the students who responded that they procured their own materials, 63 percent reported that they obtained their materials through the campus bookstore, 51 percent from an online retailer like Amazon/Chegg/eBay, 25 percent directly from a publisher, and 19 percent from an off-campus bookstore.

Eighty-four percent purchased their materials (new or used), 59 percent rented (including from publishers), and 9 percent borrowed. Of those who purchased materials, 55 percent indicated they purchased new, and 52 percent used. There were no substantial differences by college generation status. Hispanic/Latino and Asian respondents (59% each) were somewhat less likely to have indicated they obtained their course materials from the campus bookstore than White (67%) and Black (62%) respondents, and somewhat more likely to have reported they obtained their materials directly from a publisher (30% and 35% compared to 21% and 22%, respectively), an off-campus bookstore (23% and 20% compared to 16% and 18%, respectively), and/or an online retailer like Amazon/Chegg/eBay (55% and 52% compared to 49% and 46%, respectively).

Hispanic/Latino (8%) and Asian (10%) respondents were also more likely than White (6%) and Black (5%) respondents to have reported they obtained their course materials by borrowing them from another student. Regardless of race/ethnicity of respondents, more than 80 percent of each group purchased their materials (new or used). However, Hispanic/Latino (63% and 11%) and Asian (62% and 14%) respondents were more likely than White (57% and 8%) and Black (54% and 7%) respondents to have rented materials (including from publishers) or borrowed materials.

Students who obtained some to all course materials through self-procurement were asked how easy or difficult it was, overall, to obtain those materials. Although a little more than half of respondents indicated the materials were very easy or easy to obtain, 34 percent reported they



were neither easy nor difficult to obtain, and 13 percent indicated they were difficult or very difficult to obtain. Respondents who are not first-generation college students (56%), white respondents (57%), community college respondents (55%), and proprietary school respondents (55%) were somewhat more likely than first-generation college respondents (49%), Hispanic/Latino respondents (45%), Black respondents (50%), Asian respondents (47%), public university respondents (50%), and private non-profit institution respondents (47%) to have indicated the course materials they obtained through self-procurement were very easy or easy to obtain.

Of those student respondents who obtained their required course materials through a campus-wide textbook rental program, equitable access program, or inclusive access program, 67 percent reported they were very satisfied or satisfied with those methods for obtaining their course materials, 27 percent were neither satisfied nor dissatisfied, and 6 percent were dissatisfied or very dissatisfied. Respondents who obtained their materials through the campus-wide programs were more likely to have been very satisfied or satisfied.

Of the 67 percent of respondents who reported satisfaction with using these methods to obtain their required course materials, 75 percent indicated that knowing they would have all of the materials and correct editions contributed to their satisfaction, 50 percent that the process of obtaining the materials was easy and stress free, 44 percent that they had materials the first day of class, 43 percent the convenience of not having to shop for materials, 21 percent that the materials cost less, and 17 percent the ability to pay later or to combine costs with their tuition bill.

Of the 6 percent of respondents who reported dissatisfaction with using these methods to obtain their required course materials, 47 percent of respondents indicated that the materials not being cheaper through the program contributed to their dissatisfaction, 33 percent cited that the material was not necessary, 27 percent said the complexity of using financial aid or paying for materials caused difficulty, 20 percent disliked the format the materials were provided in, 18 percent had difficulty in figuring out how to obtain the materials, and 14 percent felt like it removed their choice or limited their options.

All students, regardless of how they obtained their required course materials, were asked their format preference for course materials. Forty-two percent of student respondents reported their preferred course material format was traditional print textbooks, 23 percent e-textbooks and interactive digital tools, and 35 percent indicated they don't have a preference, or it depends on the course. There was no difference in course material format preference by college generation status. White respondents (47%) were more likely than Hispanic/Latino (38%), Black (43%), and Asian (26%) respondents to have indicated they prefer traditional print textbooks, and Asian respondents (33%) were more likely than White (18%), Hispanic/Latino (24%), and Black (25%) respondents to have reported they prefer e-textbooks and interactive digital tools.

Sixty-five percent of respondents who prefer traditional print textbooks/course materials indicated a reason is that it is easier to maneuver to different pages/chapters, 60 percent like to write on/highlight a paper textbook, 45 percent don't like reading digital textbooks, 17 percent do not have the ability to print large sections from a digital textbook, and 12 percent reported some digital textbooks are not compatible with their computer system.

Seventy-three percent of respondents who prefer e-textbooks and/or digital tools indicated that they are more convenient, 50 percent each that they are more cost effective and/or that they like the search capability in an electronic format, 35 percent like the ability to cut and paste, 33 percent like the interactive aspect, and 30 percent like being able to take notes without writing in the book, or in a separate document.

**Table 3: School Respondents – Course Material Format Preference**

Preferred Course Material Format	Overall	1	2	3	4
Traditional print textbooks	<b>42%</b>	45%	44%	36%	37%
E-textbooks and interactive digital tools	<b>23%</b>	22%	19%	30%	24%
I don't have a preference or it depends on the course	<b>35%</b>	33%	37%	34%	39%

**1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access**

More than half (53%) of all Illinois school survey respondents reported the format preference for required course materials for overall faculty at their institution is traditional print, 18 percent print with a digital component (e.g., access code, online access, support), 17 percent digital textbooks, and 12 percent digital textbooks with digital extras.

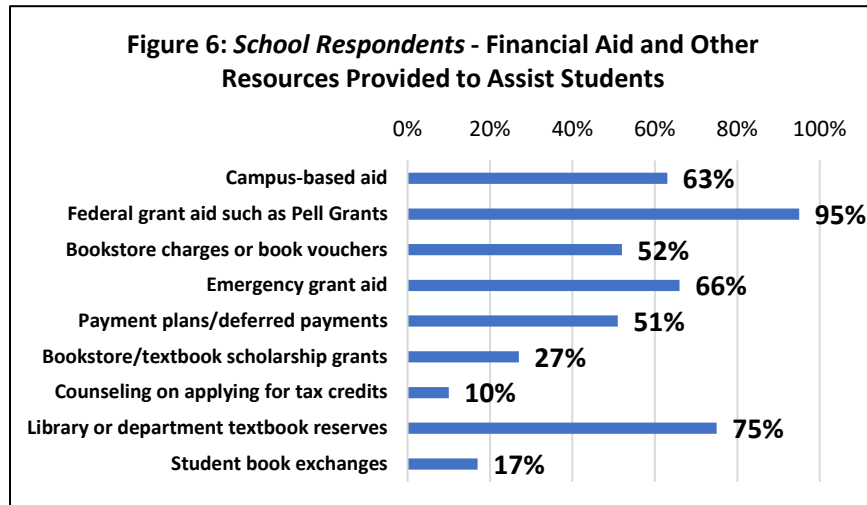
Campus-wide equitable access program respondents and self-procurement and inclusive access program respondents were more likely than self-procurement only and campus-wide textbook rental program respondents to have indicated faculty have a digital format preference, and campus-wide textbook rental program respondents were much more likely than self-procurement only, campus-wide equitable access program, and self-procurement and inclusive access program respondents to have indicated faculty have a traditional print textbook format preference. Seventy-three percent of public universities reported faculty prefer traditional print materials, while about half of community college (50%), proprietary school (48%, 2 schools), and private non-profit institution (49%) respondents reported this faculty preference. Forty-three percent of proprietary school respondents and about one-third of community college (34%) and private non-profit (28%) respondents indicated faculty prefer digital textbooks or digital textbooks with digital extras compared to 14 percent of public university respondents.

**Table 4: School Respondents – Faculty Format Preference for Required Course Materials**

	Overall	1	2	3	4
Traditional print textbook	<b>53%</b>	56%	82%	39%	43%
Print textbook with a digital component (e.g., access code, online access, support)	<b>18%</b>	21%	12%	26%	11%
Digital textbook	<b>17%</b>	15%	4%	15%	24%
Digital textbook with digital extras	<b>12%</b>	8%	2%	20%	22%

**1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access**

Many school respondents reported they are providing financial aid and other resources to students to assist them in affording course materials. Ninety-five percent are providing federal grant aid such as Pell grants, which low-income students can use for other costs of attendance like course materials once tuition and fees are covered, 75 percent library or department textbook reserves, 66 percent emergency grant aid, 63 percent campus-based aid, 52 percent bookstore charging or book vouchers, 51 percent payment plans/deferred payments (i.e. veterans book check delays), 27 percent bookstore/textbook scholarship grants, 17 percent student book exchanges, and 10 percent counseling on applying for tax credits that may offset the cost of course materials. Twenty-two percent of respondents indicated some other financial aid or resource, and some of those respondents commented on those other resources; most often mentioned were institutional aid or other scholarships.



Nearly all respondents, regardless of sector, are providing federal aid such as Pell grants. Community college respondents reported providing financial aid and other resources more often than respondents from the other sectors: library or department textbook reserves and/or emergency grant aid (95% each), 75 percent campus-based aid, 65 percent bookstore charging or book vouchers, 65 percent payment plans/deferred payments, 50 percent bookstore/textbook scholarship grants, 25 percent student book exchanges, and 20 percent counseling on applying for tax credits. A substantial percentage of public university respondents also reported providing campus-based aid (70%) and bookstore charges or book vouchers (60%), and a substantial percentage of private non-profit respondents also reported providing emergency grant aid (60%). Although only based on 3 respondents, no proprietary respondents reported providing campus-based aid, bookstore charges or book vouchers, emergency grant aid, bookstore/textbook scholarship grants, counseling on applying for tax credits, or student book exchanges.

A substantial percentage of self-procurement only and campus-wide textbook rental program school respondents indicated they are unsure (22% to 39%) of the average percentage of overall staff/individuals in the various areas within the institution who are aware of the equitable/inclusive access program concepts. The largest proportion, 34 percent, reported that administration staff at their institutions fall within the more than 50 percent awareness range on these concepts. Of the 35 percent of respondents that indicated 25 percent or less of administration were aware of the inclusive and equitable access concepts, 6 are private non-profit institutions, 3 community colleges, and 4 public universities.

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**Awareness by institutional administration of the course material models varied; 34 percent reported that administration staff fall in the more than 50 percent awareness range on equitable/inclusive access programs, compared to 56 percent falling within that range on OER.**

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All respondents were asked about awareness of the OER concept for course materials; 17 to 25 percent indicated they were unsure of awareness amongst staff in the various areas, and the largest proportion, 56 percent, reported administration staff at their institutions fall within the more than 50 percent awareness range on this concept. Of the 15 percent of respondents that indicated 25 percent or less of administration were aware of the OER concept, 8 are private non-profit institutions, 1 community college, and 1 public university.

Self-procurement and inclusive access program respondents were asked about awareness of the inclusive access and equitable access program concepts; 6 to 29 percent indicated they were unsure of awareness amongst staff in the various areas, and the largest proportion, about 65 percent, reported administration staff at their institutions fall within the more

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**Seventeen Illinois colleges and universities are considering offering a campus-wide textbook rental program in the future, and 20 schools a campus-wide equitable access program. Sixteen of the 19 self-procurement and inclusive access school respondents indicated they are considering offering inclusive access for additional courses, and 11 of the 19 are considering offering a campus-wide equitable access program.**

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than 50 percent awareness range on these concepts. Of the 12 percent of respondents that indicated 25 percent or less of administration were aware of the inclusive access concept, 1 is a private non-profit institution and 1 a community college. Of the 12 percent of respondents that indicated 25 percent or less of administration were aware of the equitable access program concept, both were community colleges.

Seventeen Illinois schools (31% of respondents) reported they are considering offering a campus-wide textbook rental program in the future, 20 schools (55% of respondents) a campus-wide equitable access program, and 19 schools (44% of respondents) a program- or course-specific inclusive access program. Sixteen of the 19

inclusive access school respondents indicated they are considering offering inclusive access for additional courses, and 11 of the 19 are considering offering a campus-wide equitable access program. The 17 schools considering offering a campus-wide textbook rental program include 10 community colleges, 6 private non-profit schools, and 1 public university. The 20 schools considering offering a campus-wide equitable access program included 10 private non-profit schools, 5 community colleges, and 5 public universities. The 19 schools considering offering a program- or course-specific inclusive access program included 9 private non-profit schools, 6 community colleges, and 4 public universities.

Sixty-nine percent of school respondents indicated they are not considering offering a campus-wide textbook rental program in the future. Reasons most often mentioned were concerns around cost/staffing and around limiting student choice. Other comments mentioned by more than one respondent included that the school is not set up/ready to include the course material cost in tuition and fees, that there is too much variance in materials across programs/courses/disciplines, that students want to keep their books, and that students already have lots of options (including renting materials). Two schools each indicated that either a campus-wide textbook rental program has not yet been discussed/investigated, or that they are currently reviewing policies and it may be considered.

Forty-five percent of self-procurement only and campus-wide textbook rental program schools are not considering offering a campus-wide equitable access program in the future. Twenty-two respondents provided a variety of comments as to why they are not considering offering a program in the future. Most often mentioned was that respondents have not discussed this concept/are still researching this concept/have not looked into this concept, a few mentioned that they don't have the manpower/resources for this method and/or it is cost prohibitive, and a couple indicated this method would limit faculty choice. Fifty-six percent of self-procurement only and campus-wide textbook rental program schools are not considering offering a course-specific inclusive access program in the future. Twenty-one respondents provided a variety of comments as to why they are not considering a program in the future. Most often mentioned was that respondents have not discussed this concept/are still researching this concept/have not looked

into this concept/it is under consideration and that they don't have the manpower/resources for this method and/or it is cost prohibitive.

Reasons for not currently utilizing OER provided by school respondents, from highest to lowest percentage were time needed to develop and/or maintain OER (59%), cost to develop and/or maintain OER (48%), low interest from faculty (34%), system capabilities/accessibility/internet access (28%), lack of support for course design/implementation (24%), low interest from administration (10%), and/or language barriers (3%). Another 38 percent of respondents identified some other reason they are not currently utilizing OER. Most often mentioned was that the OER materials are considered lower quality or that OER are not available for the type of courses taught at the institution.

### **Other Related Points of Interest from the Illinois School and/or Student Surveys:**

#### *Overall*

- School respondents indicated that nearly 21,000 instructors/faculty taught undergraduate students at their institutions in the fall of 2021, with an average of 322 and a median of 235 per school respondent. According to respondents, undergraduate students took an average of 3.9 courses and a median of 4 courses in the fall of 2021, and those students needed to obtain an average of 2.0 and median of 2.0 required course materials per course.
  - Thirty-seven percent of instructors/faculty were at community colleges (average of 348 per school), 35 percent at private non-profit institutions (average of 235 per school), 24 percent at public universities (average of 567 per school), and 4 percent at the three proprietary schools (average of 303 per school).
  - The average number of courses taken per student and the average number of required course materials per course varied somewhat by sector: 2.9 courses per student and 1.0 course materials per course for community college respondents, 3.7 and 1.3 for proprietary school respondents, 4.4 and 1.9 for private non-profit institution respondents, and 4.3 and 2.4 for public university respondents.
- Student respondents reported taking an average of 4.0 courses in the fall 2021 term, and indicated they were required to obtain an average of 3.1 course materials for those courses.

#### *Campus-Wide Textbook Rental or Equitable Access Program, or Inclusive Access*

- More than four-fifths (86%) of campus-wide textbook rental program schools reported the format of materials were traditional print textbooks. Although only based on 6 schools, 36 percent of campus-wide equitable access program schools reported the format of materials as traditional print textbooks, 38 percent as e-textbooks and interactive tools, and 26 percent were a combination of traditional and electronic materials. Forty-five percent of inclusive access respondents indicated the format of materials as e-textbooks and interactive tools, and 55 percent e-textbooks and interactive digital tools with optional print upgrade.
  - Sixty percent of campus-wide textbook rental program respondents (3 of 5 responding schools) indicated that digital course materials were offered through inclusive access as part of their textbook rental program.
- Of those student respondents who obtained required course materials through a campus-wide textbook rental or equitable access program, or through inclusive access, 52 percent reported the format of their materials provided was a combination of traditional print and electronic

materials, 27 percent e-textbooks and interactive tools, and 20 percent traditional print textbooks. Students receiving materials through a textbook rental program were more likely to have been provided traditional print textbooks and less likely electronic materials than students obtaining materials through equitable or inclusive access.

- According to school respondents, campus-wide textbook rental programs and inclusive access for a specific course(s) were most often coordinated/led by an institutional or affiliated bookstore (60% and 56%). Two textbook rental program schools reported that a specific department or division has been set up to coordinate the program. Inclusive access programs are also led by faculty (22%), an institution/department (11%), and other, identified as a collaboration between the bookstore and a couple of departments (11%). Two equitable access program schools (33%) reported their program was led by an institutional or affiliated bookstore, two by an institution/department, one by the library, and one other, identified as the Dean of Academic Affairs.

#### *Campus-Wide Textbook Rental or Equitable Access Program*

- Eighty-two percent of campus-wide textbook rental program and equitable access program schools (11 of the 12 schools answered this question) reported that 5 percent or less opted out of those campus-wide programs.

#### *Campus-Wide Equitable Access Program or Inclusive Access*

- Sixty-seven percent of campus-wide equitable access program schools and schools offering inclusive access for a course(s) reported students have access to a course material for the length of their course only. One equitable access school indicated materials are available indefinitely, and two schools indicated other, identified as three years after graduation and according to the publisher's terms. Other lengths of time specified by schools providing inclusive access include two years, 180 days, and that the majority of course materials have indefinite capabilities.

#### *Inclusive Access*

- About 80 percent of all inclusive access school respondents provided utilization of inclusive access data at their institution. Thirty percent (1,755 instructors) of all instructors/faculty at these schools were utilizing inclusive access for required course materials in at least one of their courses/classes/sections in the fall of 2021. Eighty-two courses per school, or 1,308 total courses were utilizing inclusive access across these schools, with 51,452 students (52% of all undergraduates at these schools) obtaining required course materials via this method in the fall of 2021.

#### *OER*

- Sixty-seven percent of all school respondents feel it is advantageous for students to have high-quality free course materials, 5 percent feel it is not advantageous, and 28 percent are unsure as to whether it is advantageous for students to have high-quality free course materials.
  - Responses from self-procurement only schools, campus-wide textbook rental program schools, and self-procurement and inclusive access program schools were similar, except for 76 percent of self-procurement and inclusive access respondents feel it is

advantageous compared to 69 percent of self-procurement only respondents, and 67 percent of campus-wide textbook rental program respondents. Campus-wide equitable access program respondents (6 schools) were less likely to feel it is advantageous for students to have high-quality free course materials; 33 percent feel it is advantageous, 17 percent feel it is not, and 50 percent indicated they are unsure.

- Seventeen to 25 percent of respondents indicated they were unsure about whether various groups on campus were aware of the OER concept. Respondents indicated more than 50 percent of overall staff/individuals in Administration (56%), Campus Bookstore (61%), Faculty (53%), and Library (74%) fell in the more than 50 percent awareness range. Respondents reported that Financial Aid (38%), Bursar/Registrar's Office (39%), Admissions (44%), and Students (52%) were more likely to fall within the 1 to 50 percent awareness range.
- Sixty-four percent of all school respondents reported OER are being used for at least some required course materials at their institution.
  - That percentage varied somewhat by how the majority of students obtain course materials at the institution – just 33 percent of campus-wide equitable access program schools (2 of the 6) indicated OER are being used for at least some required course materials at their institution.
- About half of all schools (52%) reported OER are being used at their institution/provided data on OER usage at their school. Fifty-five percent of self-procurement only schools indicated OER are being used at their institution/provided data on OER usage at their school, along with 17 percent of textbook rental schools, 33 percent of equitable access program schools, and 63 percent of schools that use both self-procurement and inclusive access.
  - Responses (from 37 schools) indicated an average of 67 instructors/faculty per school (2,483 total instructors/faculty) were using OER for at least one course in the fall of 2021. An average of 106 courses per school (4,045 total courses) were using OER as required course materials for fall 2021. An average of 2,218 students per school (68,767 total students) were enrolled in courses using OER for required course materials. Self-procurement only and self-procurement and inclusive access respondents were more likely than campus-wide textbook rental program and equitable access program respondents to be utilizing OER in the fall of 2021.
- More than half of school respondents (53%) reported that students have access to OER course material indefinitely (or as long as they are available), 19 percent for the length of their course only, 12 percent for as long as the student is enrolled at the institution, and 16 percent indicated some other length of time students have access to OER course materials, most often identified as varying by source of the OER material.
  - Self-procurement only and self-procurement and inclusive access responses were similar. Campus-wide textbook rental program and equitable access program respondents were more likely than other respondents to have indicated access to OER materials is for the length of the course only (67% and 100%, respectively), but responses were based on responses from three schools and two schools, respectively.
  - The breakdowns by sector were similar; community college respondents were somewhat more likely than respondents in the other sectors to have indicated students, on average, have access to OER course materials indefinitely, public university respondents were somewhat more likely than the other sectors to have reported students have access to an OER material for the length of the course only, and private non-profit institution respondents were somewhat more likely than the other sectors to have indicated students

have access to the OER resources as long as they are enrolled at the institution. The one proprietary school respondent indicated students have access, on average, to an OER course material for the length of the course only.

- Fifty-two percent of student respondents reported they had at least one class in fall 2021 that did not require them to obtain course materials, or on average, 0.9 fall 2021 term classes per respondent that did not require them to obtain course materials. Reasons why students reported they did not need to purchase course materials for a class included materials were provided for free, possibly through OER (46%), none were required (45%), materials were required but the instructor didn't actually use them (16%), the student had already purchased the required materials for a previous course (10%), the student got access to the materials through the library (7%), the student borrowed or shared the materials with someone (6%), and/or the student had a disability so did not purchase the material(s) because they were not accessible to them (less than 1%). Extrapolating to all student respondents suggests approximately one-quarter of all respondents didn't have to obtain materials for at least one class because the materials were provided for free, possibly through OER.
  - Of those respondents who obtained some to all of their required course materials through self-procurement, and who had at least one material provided for free, 80 percent or more reported all (47%) or some (33%) of the free materials were easy to obtain, all (47%) or some (33%) were provided in a digital format, and all (42%) or some (39%) were an important component of the class. While just 67 percent of respondents reported all (32%) or some (35%) of their free materials were available on the first day of class, it is possible the materials were available shortly after the first day of class.
  - Respondents who reported they had at least one class in fall 2021 that did not require them to obtain course materials varied by sector of respondents, from 64 percent of public university respondents, to 56 percent of private non-profit respondents, to 42 percent of community college respondents, to 31 percent of proprietary school respondents.

#### *Awareness and Interest in Methods*

- Thirty-one percent (17 schools) not currently providing the majority of course materials through a campus-wide textbook rental program indicated they are considering offering one in the future.
  - The percentage who indicated they are considering offering a campus-wide textbook rental program differed by how schools are currently providing course materials for the majority of their students, no equitable access program schools, 29 percent at self-procurement only schools, and 41 percent at self-procurement and inclusive access schools.
  - Of the seventeen schools (31%) that indicated they are considering offering a campus-wide textbook rental program, 19 percent reported the COVID pandemic contributed to their consideration to offer the program in the future.
  - Comments most often mentioned (for not considering a campus-wide textbook rental program in the future) were concerns around cost/staffing and around limiting student choice. Other comments mentioned by more than one respondent included that the school is not set up/ready to include the course material cost in tuition and fees, that there is too much variance in materials across programs/courses/disciplines, that students want to keep their books, and that students already have lots of options (including renting materials). Two schools each indicated that either a campus-wide textbook rental program has not yet been discussed/investigated, or that they are currently reviewing policies and it may be considered.



- Schools providing the majority of course materials through self-procurement only or a campus-wide textbook rental program were asked about the awareness of, and interest in, offering a campus-wide equitable access program or inclusive access for a course(s). Twenty-two to 39 percent of respondents indicated they were unsure about whether various groups on campus were aware of the equitable/inclusive access program concept. Respondents indicated that 32 to 39 percent of individuals in Administration, Financial Aid, Bursar/Registrar's Office, and Admissions fell in the 1 to 25 percent awareness range. Thirty-four percent of Administration fell within the 51 to 100 percent awareness range, 46 percent of Faculty fell within the 26 to 75 percent awareness range, and 37 percent of Campus Bookstore fell within the 76 to 100 percent awareness range.
- Fifty-five percent of self-procurement only and campus-wide textbook rental program schools (20 schools) are considering offering a campus-wide equitable access program in the future. Textbook rental program schools were more likely than self-procurement only schools to have indicated they are considering offering a campus-wide equitable access program, although the 60% considering it represents just 3 schools.
  - Twenty-two respondents (48% of self-procurement only and campus-wide textbook rental program respondents) provided a variety of comments as to why they are not considering offering a campus-wide equitable access program in the future. Most often mentioned was that respondents have not discussed this concept/are still researching this concept/have not looked into this concept, a few mentioned that they don't have the manpower/resources for this method and/or it is cost prohibitive, and a couple indicated this method would limit faculty choice.
- Forty-four percent of self-procurement only and campus-wide textbook rental program schools (19 schools) are considering offering a course-specific inclusive access program in the future. Textbook rental program schools were more likely than self-procurement only schools to have indicated they are considering offering a course-specific inclusive access program, although the 60% considering it represents just 3 schools.
  - Twenty-one respondents (46% of self-procurement only and campus-wide textbook rental program respondents) provided a variety of comments as to why they are not considering offering a course-specific inclusive access program in the future. Most often mentioned was that respondents have not discussed this concept/are still researching this concept/have not looked into this concept/it is under consideration and that they don't have the manpower/resources for this method and/or it is cost prohibitive.
- About one-third of both self-procurement only schools and campus-wide textbook rental programs schools that indicated they are considering offering a campus-wide equitable access program or course-specific inclusive access program reported the COVID pandemic contributed to their consideration to offer the program in the future.
- Schools providing course materials through a combination of self-procurement and inclusive access for some courses were asked about both awareness of the inclusive access concept and campus-wide equitable access concept and whether they are considering offering additional materials via inclusive access or instituting a campus-wide equitable access program in the future. Respondents reported that 50 percent or more of Administration (65%), Bursar/Registrar's Office (50%), Campus Bookstore (89%), and Faculty (59%) fell within the more than 50 percent awareness range on the inclusive access program concept. Less than 50 percent of Financial Aid (47%), Admissions (42%), and Students (18%) fell within the

more than 50 percent awareness range. Nealy one-third of respondents indicated they were unsure about the awareness level of the inclusive access concept among students.

- Eighty-nine percent of inclusive access schools (16 schools) reported they are considering offering inclusive access for additional courses/materials in the future.
  - Three respondents provided comments about why they are not considering offering inclusive access for additional courses materials in the future. One indicated it will depend on the cost of the course material and faculty selection of that option, one indicated some students may obtain course materials cheaper than what the school can provide, and one respondent reported they are implementing a program in summer 2022 that will include course materials as part of a universal fee.
  - Thirty-eight percent of the 16 inclusive access schools that indicated they are considering offering inclusive access for additional courses/materials in the future reported the COVID pandemic contributed to that consideration.
- Respondents providing course materials through a combination of self-procurement and inclusive access for some courses reported that 50 percent or more of Administration (64%) and Campus Bookstore (68%) fell within the more than 50 percent awareness range on the campus-wide equitable access program concept. Less than 50 percent of Financial Aid (42%), Bursar/Registrar's Office (47%), Admissions (46%), Faculty (41%), and Students (12%) fell within the more than 50 percent awareness range. Nealy one-quarter of respondents indicated they were unsure about the awareness level of the equitable access concept among students, and 35 percent fell within the 1 to 25 percent awareness range. Of interest, one-quarter of respondents reported the Campus Bookstore in the 25 percent or less awareness range on the equitable access concept.
- Sixty-five percent of self-procurement and inclusive access program schools (11 schools) reported they are considering offering an equitable access program in the future.
  - Four respondents provided comments about why they are not considering offering a campus-wide equitable access program for courses materials in the future. One indicated an equitable access program would need to be assessed against current offerings before making a decision, one indicated that they currently do not have enough awareness of this opportunity, that they need to do more research, and might consider inclusive access at the program level (not equitable access at the college level), one commented on time and staffing constraints, and one reported that equitable access is not part of their current strategy.
  - Nine percent of the 11 self-procurement and inclusive access program schools that indicated they are considering offering an equitable access program in the future reported the COVID pandemic contributed to that consideration.

#### **Other Related Points of Interest from National Data:**

Both inclusive access/equitable access and OER are course material methods that likely represent no out-of-pocket (after college bill) cost, as inclusive access/equitable access is usually included in the tuition and fee cost/college bill and OER are usually free to the student, OER are likely to be available to students by the first day of class or soon after, and inclusive/equitable access materials are usually available by the first day of class. Students who obtain their materials through self-procurement often are facing an out-of-pocket cost unless the school is able to front any forthcoming financial aid that can be used for course materials. Issues with financial aid distribution can place lower-income students at a disadvantage. Not getting financial aid funds

before the semester starts is not always a result of students not submitting required financial aid forms by deadlines, but rather a limitation of state and federal funding or the process of paperwork at the institutional and/or funders' level (Perez, 2021). Although there are some similarities between inclusive access/equitable access and OER, there are also substantial differences. Some applaud the movement to inclusive and equitable access, and OER, and champion a multi-prong course material approach to improve college affordability and equity, while others are skeptical. Points of contention mentioned in Task Force presentations and highlighted in existing research, revolved around associated costs to the student and costs to develop and maintain materials, the length of time materials are available to the student, who produces the material and who maintains/keeps them up-to-date, accessibility of materials, impact on academic freedom to choose materials, scalability, etc.

The annual NACS *Student Watch* report includes numerous additional data points on the college course materials experience for students in academic year 2020-21 and reflects impacts from the COVID-19 pandemic. Many higher education institutions switched in-person classes either to fully online, hybrid models (some sessions online, some in the classroom), or HyFlex structures (optional online or in person sessions). Some campuses closed or restricted their physical facilities to students, including the campus store. In a typical year, only about 18 percent of students take one but not all online-only courses, while 17 percent are exclusively enrolled in online-only courses. During the 2020-21 academic year, 81 percent of respondents had taken classes that were fully online at some point during the year. More than 40 percent of students said they would be more likely to take online courses in the future, 21 percent would be less likely.

Fewer respondents rented materials in 2021 while more paid for digital materials and downloaded materials for free. However, purchasing (79%) remains the primary way students acquire materials, and renting (34%) is the second most common form of acquisition. The number of students downloading materials for free increased this year similarly to how it had increased in previous years (32% in spring 2021 compared to 26% and 22% in the previous two years). The highest percent of students borrowing at least one of their materials was in spring 2019 when 15 percent of students borrowed materials; that percentage has decreased slightly down to 13 percent in spring 2021.

The format of course materials acquired is another area that saw a sizable shakeup in 2021. Typically used print is the most common unit acquired, followed by new print materials, with digital trailing quite a bit further behind. In 2021, all three unit types were within a few percentage points of one another: new print – 32 percent, used print – 31 percent, and digital – 29 percent. Forty-five percent of students reported obtaining at least one digital course material in academic year 2020-21.

Despite the shakeup in usage and acquisitions, format preference is one of few areas that saw little change in 2021. Forty-eight percent of students surveyed in both 2021 and in 2020 preferred some type of print materials (whether it is traditional standalone print or print with additional digital components), 23 percent of students preferred some type of digital materials (whether it's a standalone e-book or a digital book with additional digital content), up slightly from 21 percent in spring 2020, and a large proportion of students, 28 percent, continue to say preference "depends on the course".

In past years, campus stores' physical locations have been the number one place students turn to in order to purchase their materials. In 2021, the campus store was still the number one place students turned to, but they purchased more from campus stores' online presence rather than their physical locations. Thirty-four percent of purchased materials were from the online

campus store (compared to 22% last year), 20 percent from the physical campus store (compared to 38% last year), about 20 percent from Amazon, and about 11 percent were purchased directly from the Publisher.

Campus stores were the number one place students turned for renting materials as well – 39 percent of rentals were through the campus store. This was similar to the year before, although rentals through the online campus store were higher in 2021 than the year before, with a corresponding decrease in rentals from the physical campus store. About a third of rentals were made through Amazon in both 2021 and 2020, and 11 percent of rented materials were through Chegg in 2021 compared to 16 percent in 2020. A little more than one in four students (28%) either purchased or rented directly from a publisher. Renting from publishers was an area that saw a particular increase this year, doubling from only 9 percent in 2020 to 18 percent in 2021. This increase is likely tied to the increase in inclusive access seen this year, with half of those who rented from a publisher also reporting using inclusive access.

Students used more free materials in spring 2021 than they have since *Student Watch* began measuring this area. Students acquired 1.04 free materials in the spring semester compared to 0.73 units acquired on average in spring 2020. The number of free materials obtained has risen and fallen multiple times since 2015.

More than one out of three students (39%) participated in an inclusive access program for at least one class during 2022. This was up from 33 percent in 2021, 26 percent in 2020, and 15 percent in 2019. The increase is believed to be primarily due to the pandemic, and presumably the need to quickly pivot to remote learning and delivery of course materials. Fifty-four percent indicated they were satisfied with their inclusive access experience, 30 percent were neither satisfied nor dissatisfied, and 16 percent were dissatisfied. Satisfaction could have been based on preferred material format.

Students indicated satisfaction with inclusive access revolved around three main reasons: knowing they'd have all of the materials and correct editions (76%), convenience of not having to shop for materials (75%), and having materials the first day of class (71%). Only 41 percent of students said their satisfaction came from materials costing less. The number one reason for dissatisfaction was the materials not costing less (44%), followed by not liking the digital format of materials (35%), materials not being necessary (33%), and feeling like it removed their choice or limited their options (32%). Of those offered inclusive access, 7 percent reported opting out (or not opting in, depending on how the program is structured).

The most recent annual NACS *Faculty Watch* report, conducted in the first semester of academic 2021-22 (representing, for many, a return to in-person instruction) indicated that the number of faculty who had participated in an inclusive access program more than doubled from 21 percent in 2020 to 54 percent in 2021. Many of the faculty (46%) who have used the program said they were new to it, another sign of how quickly this approach to course materials is growing. Usage of inclusive access varies based on subject matter discipline. More than 70 percent of business and computer science faculty have used inclusive access before compared to 34 percent of social science faculty members. Similarly, faculty teaching hybrid/hyflex courses this past fall term were twice as likely to have used inclusive access as their peers teaching in person.

In 2019, 26 percent of faculty were not aware of OER, which fell to only 7 percent in 2021. Despite awareness actual usage of OER remained flat at 37 percent, growing only 4 percent since 2018. Forty-nine percent of faculty required no course materials for at least one of their courses, and 10 percent required no materials across all their courses. Top reasons for not requiring course

materials were feeling that students could get by with other materials (class notes, handouts, downloads, etc.), and just not needing any required materials for the courses (Student Watch, 2021; Student Watch, 2022; Faculty Watch, 2022).

## **2. What is the total amount of cost savings achieved by public and private institutions of higher learning and the total number of students that utilize each cost-saving method?**

The Illinois school survey results indicate the majority of students obtained required college course materials through either self-procurement only (59%, representing 209,240 undergrads at responding schools) or a combination of self-procurement and inclusive access (25%, representing 98,259 undergrads), and eight percent each (6 schools each, representing 23,078 and 4,955 undergrads, respectively) through a campus-wide textbook rental program or through a campus-wide equitable access program, in the fall of 2021.

Seventy percent of all self-procurement only and self-procurement (with inclusive access) school respondents (41 of 59) provided the estimated number of required course materials purchased and/or rented through the campus bookstore (whatever that setup was) through the formats/ methods below. Of the student respondents who procured their own materials, 63 percent reported that they obtained their materials through the campus bookstore, 51 percent from an online retailer like Amazon/Chegg/eBay, 25 percent directly from a publisher, and 19 percent from an off-campus bookstore. The number of schools providing an estimate for each of the methods below (through the campus bookstore) suggest that 100 percent of schools utilized/offered new print purchase materials (49% of purchases), 98 percent used print purchase materials (14% of purchases), 95 percent digital purchase materials (16% of purchases), 88 percent new print rental (9% of purchases), 90 percent used print rental (11% of purchases), and 73 percent digital bundled subscription (2% of purchases). It is, however, possible that a school did not provide an estimate because that data was not available.

Overall, new and used print purchases made up 63 percent of all acquisitions, and new and used print rentals made up 20 percent. Digital purchases made up a higher percentage of the total purchases and/or rentals at self-procurement (with inclusive access) schools than at self-procurement only schools (28% vs. 11%), while all other percentages were lower. The percentage breakdowns of materials purchased or rented for community college and public universities were similar and looked a lot like the overall percentage breakdown. Private non-profit school respondents reported fewer new print purchases (38%) and more used print rentals (20%) than overall respondents. The one proprietary school that provided data reported 38 percent new print purchases and 62 percent digital purchases.

**Table 5: School Respondents - The Number of Required Course Materials Purchased and/or Rented Using the Following Six Methods Through the Institutional or Affiliated (Barnes & Noble, Follett, etc.) Bookstore for Undergraduate Students in the Fall of 2021**  
(Average shown and all purchased as a % of all total)

	Overall	Self-Procurement Only	Self-Procurement (with Inclusive Access)
Campus Bookstore New Print Purchase (Self-Procurement Only n=27 and Self-Procurement and Inclusive Access n=14)	<b>3,649/49%</b>	4008/50%	2,957/47%
Campus Bookstore Used Print Purchase (n=26 and 14)	<b>1,083/14%</b>	1311/16%	581/9%
Campus Bookstore Digital Purchase (n=25 and 14)	<b>1,277/16%</b>	943/11%	1,783/28%
Campus Bookstore New Print Rental (n=22 and 14)	<b>912/9%</b>	988/10%	468/7%
Campus Bookstore Used Print Rental (n=23 and 14)	<b>1,046/11%</b>	1160/12%	485/8%
Digital Bundled Subscription (i.e. Cengage Unlimited) (n=16 and 14)	<b>185/2%</b>	243/2%	52/1%

Up to 70 percent of all school respondents where students self-procure some to all of their required course materials (41 of 59) provided the average cost of those required materials purchased and/or rented through the methods below, but that varied from 39 percent that provided an estimate for a digital bundled subscription to 70 percent that provided an estimate for a new print purchase.

The estimated average campus bookstore cost varied by method: \$98 for a new print purchase, \$63 for a used print purchase, \$61 for a digital purchase, \$49 for a new print rental, and \$39 for a used print rental. The estimated average campus bookstore cost for a digital bundled subscription, which for Cengage Unlimited would include (for a 4 month period/1 term) access to all Cengage online learning platforms, access to their entire library of e-Textbooks, and at least 4 free hardcopy textbook rentals (\$9.99 S&H each) was \$120. All or some needed course materials may need to be from Cengage (for example) for that subscription to be cheaper than other formats available to the student. The average costs of materials purchased and/or rented were similar for community college, private non-profit, and public university respondents. For the one proprietary school that provided average cost information for two categories, the average new print purchase cost was higher than the average costs provided by the other three sectors, and the average digital purchase cost was lower.

**Table 6: School Respondents - The Average Cost of Required Course Materials Purchased and/or Rented Using the Six Following Methods Through the Institutional or Affiliated (Barnes & Noble, Follett, etc.) Bookstore for Undergraduate Students in the Fall of 2021**

	Overall	Self-Procurement Only	Self-Procurement (with Inclusive Access)
Campus Bookstore New Print Purchase (70%)	<b>\$98</b>	\$100	\$94
Campus Bookstore Used Print Purchase (64%)	<b>\$63</b>	\$63	\$63
Campus Bookstore Digital Purchase (61%)	<b>\$61</b>	\$64	\$56
Campus Bookstore New Print Rental (51%)	<b>\$49</b>	\$51	\$43
Campus Bookstore Used Print Rental (53%)	<b>\$39</b>	\$39	\$40
Digital Bundled Subscription (i.e. Cengage Unlimited) (39%)	<b>\$120</b>	\$116	\$129

Cost savings resulting from the different choices offered through the campus bookstore can be estimated from the data provided by the 70 percent of all self-procurement only and self-procurement (with inclusive access) school respondents (41 of 59 schools). If all course materials had been purchased as new print textbooks, the cost would have been about \$31 million for students. The ability to purchase materials in the other formats – used print, digital, new or used rental, or digital subscription resulted in an actual average cost of about \$24 million, and total cost savings of about \$7 million (about \$171,000 per school) for students. This estimate assumes a student obtains two e-books per digital subscription; more than that would result in greater savings. Similarly, if students could/would have made fewer new print purchases, the cost savings would have been higher.

Again, these cost savings are based on the data provided by 41 Illinois schools that have either a self-procurement only or self-procurement (with inclusive access) model for the majority of their students. Applying the various breakdowns provided by school respondents to the entire school survey population (123 Illinois MAP-approved schools) results in an estimated 103 schools where students self-procure some to all of their required course materials, and 103 schools multiplied by the average cost savings of \$171,000 per school, from offering the various different (cheaper) formats, results in an estimated cost savings for the entire school survey population of nearly \$18 million. Students who obtained required course materials outside of the campus bookstore, who utilized cheaper material formats, may have saved additional money on course materials.

**Table 7: School Respondents - The Cost Difference/Savings Realized Through the Various Format Choices Offered Through the Institutional or Affiliated (Barnes & Noble, Follett, etc.) Bookstore Compared to Purchasing All Materials as New Print Materials for Undergraduate Students in the Fall of 2021**

	Overall Purchased/ Rented	Average Cost	Purchased/ Rented x Avg New Print Cost	Purchased/ Rented x Actual Avg Cost	Cost Difference
Campus Bookstore New Print Purchase	149,619	\$98	\$14.7 M	\$14.7 M	-
Campus Bookstore Used Print Purchase	42,221	\$63	\$4.1 M	\$2.7 M	\$1.4 M
Campus Bookstore Digital Purchase	48,544	\$61	\$4.8 M	\$3.0 M	\$1.8 M
Campus Bookstore New Print Rental	28,274	\$49	\$2.8 M	\$1.4 M	\$1.4 M
Campus Bookstore Used Print Rental	33,459	\$39	\$3.3 M	\$1.3 M	\$2.0 M
Digital Bundled Subscription (i.e. Cengage Unlimited)	4,619	\$120	\$.9 M	\$.6 M	\$.3 M

School respondents with campus-wide textbook rental programs or equitable access programs, or inclusive access were asked to estimate course material cost savings to undergraduates in the fall of 2021 resulting from utilizing these programs. Just half of both campus-wide textbook rental program respondents and half of equitable access program respondents (3 of 6 schools each) provided estimated cost savings, and about half of inclusive access program respondents (9 of 19 schools) provided estimated cost savings. Additionally, respondents provided both overall and per student savings that required manipulation and used different self-procurement costs to calculate savings (new, average, print, digital, etc.). Due to wide variances, medians were calculated based on savings per student.

According to the data provided by respondents, a median cost savings of \$650 per student was accomplished through a campus-wide textbook rental program, a median cost savings of

\$200 per student was accomplished through a campus-wide equitable access program, and a median cost savings of \$42 per student was accomplished through an inclusive access program. The cost savings through inclusive access would be lower due to students only acquiring materials for participating courses through that method versus all courses participating in the program like in campus-wide textbook rental and equitable access programs. These median cost savings multiplied by the number of students that school respondents indicated are using these methods results in cost savings through campus-wide textbook rental of about \$15 million (23,078 students (7% of students at responding schools) times a median cost savings of \$650 per student), about \$991 thousand in cost savings through campus-wide equitable access (4,955 students (1.5% of students at responding schools) times a median cost savings of \$200 per student), and about \$2.2 million in cost savings through program- or course-specific inclusive access (51,452 students (15% of students at responding schools) times \$42 per student in cost savings). These savings do not factor in that these models are more likely to provide first-day access to materials and any impact this benefit could have on course success and cost savings. In addition, these cost savings only represent estimated savings at the schools that responded to the survey.

**Table 8: School Respondents - Estimated Cost Savings to Undergraduate Students in the Fall of 2021 by Utilizing a Campus-Wide Textbook Rental Program or Equitable Access Program, or Inclusive Access Program Versus Acquiring the Materials Through Self-Procurement**

	Textbook Rental Program	Equitable Access Program	Inclusive Access
Overall	\$716 Average/ \$650 Median	\$385 Average/ \$200 Median	\$151 Average/ \$42 Median

Applying the breakdown of students represented by school respondents that indicated the majority of their students are obtaining materials through a campus-wide textbook rental (7%) or equitable access programs (1.5%), or through inclusive access (15%), to all Illinois certificate- and degree-seeking students (about 580,000 students at the schools surveyed, according to the most recent IPEDS data) results in 40,600 textbook rental program students, 8,700 equitable access program students, and 87,000 inclusive access students. The 40,600 Illinois undergrad textbook rental program students multiplied by the school survey overall median cost savings of \$650 per student accomplished through a campus-wide textbook rental program, results in overall cost savings for all Illinois undergrad certificate- and degree-seeking students (at MAP-approved schools) of about \$26.3 million. The 8,700 Illinois undergrad equitable access program students multiplied by the school survey overall median cost savings of \$200 per student accomplished through a campus-wide equitable access program, results in overall cost savings for all Illinois undergrad certificate- and degree-seeking students (at MAP-approved schools) of about \$1.7 million. Note that estimated cost savings for campus-wide textbook rental and equitable access programs are based on data from a very small number of respondents. The 87,000 Illinois undergrad inclusive access students multiplied by the school survey overall median cost savings of \$42 per student accomplished through inclusive access, results in overall cost savings for all Illinois undergrad certificate- and degree-seeking students (at MAP-approved schools) of about \$3.7 million. Again, the cost savings through inclusive access would be lower due to students only acquiring materials for participating courses through that method versus all courses participating in the program like in campus-wide textbook rental and equitable access programs.



School respondents were asked to estimate course material cost savings to undergraduates in the fall of 2021 resulting from utilizing OER. Just one each of both campus-wide textbook rental program respondents and equitable access program respondents (of the total 6 schools each) provided estimated cost savings, 13 of the 40 self-procurement only respondents (33%), and about half of self-procurement and inclusive access program respondents (10 of 19 schools) provided estimated cost savings. Additionally, respondents provided both overall and per student savings that required manipulation and used different costs to calculate savings (new, average, print, digital, etc.). Due to wide variances, medians were calculated based on savings per student. According to the data provided by respondents, an overall median cost savings of \$89 per student was accomplished through OER utilization. A median cost savings of \$59 per student in self-procurement only schools was accomplished through OER utilization, a median cost savings of \$75 per student in one campus-wide textbook rental program school, a median cost savings of \$100 per student in one campus-wide equitable access program school, and a median cost savings of \$95 per student in a self-procurement and inclusive access program was accomplished through utilization of OER.

**Table 9: School Respondents - Estimated Cost Savings to Undergraduate Students in the Fall of 2021 by Utilizing OER**

Overall	1	2	3	4
<b>\$116 Average/ \$89 Median</b>	\$140 Average/ \$59 Median	\$75 Average/ \$75 Median	\$100 Average/ \$100 Median	\$91 Average/ \$95 Median

1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access

Based on the data from school respondents, that provided data on utilization of OER at their schools (representing nearly 196,000 of all undergraduates, and about 35% of all undergrads at MAP-approved schools), 68,767 undergraduates utilized OER for coursework in the fall of 2021, resulting in at least \$6.1 million in cost savings. These cost savings only represent savings at the schools that responded to the survey.

Forty-five percent of self-procurement only schools (18 of the 40) provided the number of students who utilized OER for a required course material in fall of 2021 (62,146 students of the total 143,756 undergrads at those schools). The number of students utilizing OER for course materials multiplied by a median cost savings of \$59 results in at least \$3.7 million in cost savings. Seventeen percent, or one campus-wide textbook rental program school (of the 6) provided the number of students who utilized OER (200 students of the total 4,625 undergrads at that school). The number of students utilizing OER multiplied by a median cost savings of \$75 results in \$15,000 in cost savings. Thirty-three percent, of two one campus-wide equitable access program schools (of the 6) provided the number of students who utilized OER (146 students of the total 2,592 undergrads at that school). The number of students utilizing OER multiplied by a median cost savings of \$100 results in \$14,600 in cost savings. Fifty-three percent of the self-procurement and inclusive access schools (10 of the 19) provided the number of students who utilized OER (6,275 students of the total 44,756 undergrads at that school). The number of students utilizing OER multiplied by a median cost savings of \$95 results in nearly \$600,000 in cost savings.

School respondents reported 68,767 undergrads enrolled in courses that utilized OER in the fall of 2021, representing about 21 percent of all respondent undergrads. Similarly, student survey results suggest approximately one-quarter of all respondents didn't have to obtain materials for at least one class because the materials were provided for free, possibly through

OER. Twenty-one percent of all Illinois certificate- and degree-seeking students (about 580,000 students at the schools surveyed, according to the most recent IPEDS data) results in about 121,800 students. The 121,800 Illinois undergrad students multiplied by the school survey overall median cost savings of \$89 per student accomplished through OER utilization, results in overall estimated cost savings for all Illinois undergrad certificate- and degree-seeking students (at MAP-approved schools) of about \$10.8 million. It is possible that schools could have provided both average cost savings per student from taking one OER course, or based on the average number of those courses students take; the estimated cost savings could be higher than \$10.8 million. Note that the median cost savings of \$89 provided by schools is somewhat higher than the estimated average campus bookstore per material costs provided by schools: \$98 for a new print purchase, \$63 for a used print purchase, \$61 for a digital purchase, \$49 for a new print rental, and \$39 for a used print rental, and somewhat higher than the median cost per material of \$77 reported by student respondents for self-procured course materials.

Costs for the different course materials varied across how the majority of students obtain their materials at the institution. Four of the six campus-wide textbook rental program respondents provided an average cost per print course material - \$62, and half provided an average cost per digital course material - \$74. Four of the six campus-wide equitable access program respondents provided an average cost per print course material - \$96, and 5 of the 6 respondents provided an average cost per digital course material - \$76.

Twelve of the 19 inclusive access respondents (63%) provided an average per e-textbook and interactive digital tools prices (for inclusive access materials) - \$70, and 9 of the 19 respondents (47%) provided an average per e-textbook and interactive digital tools with optional print upgrade price (for inclusive access materials) - \$79.

Although 62 percent of respondents (campus-wide textbook rental and equitable access program respondents and inclusive access respondents) indicated prices, on average, are less expensive (58%) or about the same (8%) as prices through an online bookstore (Amazon Books, Chegg, eBay, etc.), and 60 percent reported prices, on average, are less expensive (44%) or about the same (16%) as publisher prices, 25 percent indicated they are unsure how prices compare to online bookstore prices, and 32 percent indicated they are unsure how prices compare to publisher prices. Additionally, eight percent each (1 campus-wide textbook rental program respondent and 1 inclusive access respondent for each comparison) reported their prices are more expensive than online bookstore and publisher prices.

The majority of student respondents who obtained all of their course materials through self-procurement only (53% of all respondents) provided cost data. The majority of respondents who obtained some of their course materials through self-procurement and some via inclusive access (31% of all respondents) provided cost data on the amount spent on self-procured materials as well. However, the data suggests that some students were confused on the cost of materials for their self-procured materials versus those they obtained via inclusive access. Additionally, a very small percentage (and number) of students who obtained materials through campus-wide textbook rental (12% of all respondents) or equitable access (4% of all respondents), or through inclusive access for a course(s), knew their material(s) cost.

For students who obtained their required course materials through self-procurement only (53% of all respondents), the median cost per material was \$77, and \$300 in total, for the fall 2021 semester. There was little to no difference in median cost per material by college generation status. Hispanic/Latino (\$69) and White (\$75) respondents spent less than Black (\$86) and Asian (\$83) respondents for completely self-procured course materials. Median cost of self-procured

materials by sector varied - \$69 for public university respondents, \$73 for private non-profit institution respondents, \$74 for proprietary school respondents, and \$88 for community college respondents.

The majority (83%) of self-procurement only and self-procurement (with inclusive access) school respondents indicated they buy back select books that are purchased, 8 percent buy back all books that are purchased, and 8 percent do not buy back books that are purchased. The largest proportion of both self-procurement only and self-procurement (with inclusive access) program respondents reported that they buy back select books that are purchased, 80% and 87%, respectively. Nearly all respondents by sector also indicated they buy back select books that are purchased: 94 percent of community college respondents, 80 percent of private non-profit institution respondents, and 75 percent of public university respondents. The one proprietary school that answered this question indicated they do not buy back books.

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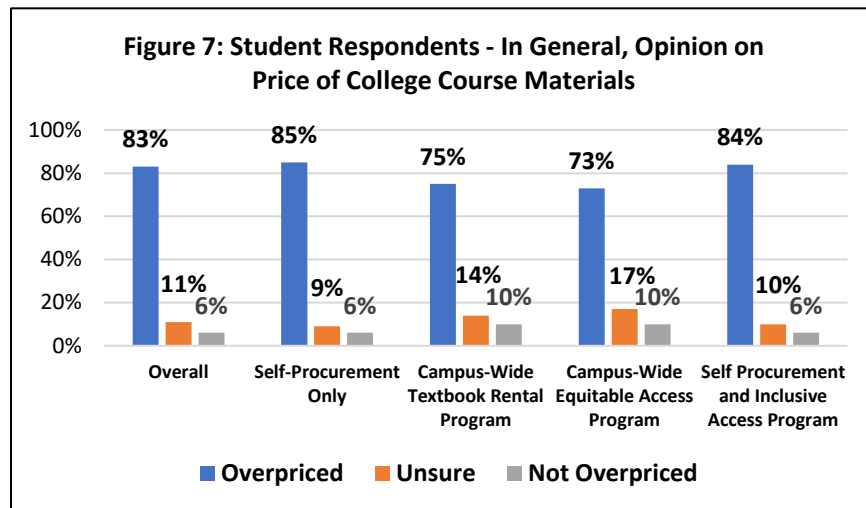
**Although 83 percent of self-procurement only and self-procurement (with inclusive access) school respondents indicated they buy back *select* books that are purchased, 84 percent of the student respondents who obtained some to all course materials through self-procurement reported they were not able to sell course materials back.**

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A little more than half of all self-procurement only and self-procurement (with inclusive access) program school respondents provided an average amount provided back per textbook in the fall of 2021. The overall average buyback amount per textbook was \$28; the average for self-procurement only respondents was \$26, and the average for self-procurement (with inclusive access) respondents was \$32. The average buyback amount per textbook varied by sector: \$37 at community colleges, \$18 at private non-profits, and \$24 at public universities. No proprietary school respondents provided the average buyback amount per textbook. Of the student respondents who obtained some to all course materials through self-procurement, 84 percent reported they were not able to sell course materials back. Twenty percent of community college respondents, 15 percent of private non-profit institution respondents, 14 percent of public university respondents, and 5 percent of proprietary school respondents reported they were able to sell course materials back.

Eighty-three percent of all student respondents reported they consider college course materials, in general, to be overpriced, 11 percent were unsure, and 6 percent indicated they were not overpriced. Respondents who obtained materials through a campus-wide textbook rental program or equitable access program were less likely than respondents who obtained their materials through self-procurement or self-procurement and inclusive access to have indicated they consider college course materials, in general, to be overpriced, 75 percent and 73 percent, compared to 85 percent and 84 percent, respectively.

There were no differences by college generation status. White respondents were slightly more likely to have reported they consider college course materials, in general, to be overpriced, than overall respondents, 85 percent compared to 83 percent, and Black respondents were slightly less likely than overall respondents to have indicated they consider materials to be overpriced, 79 percent compared to 83 percent. Public university (89%) and private non-profit institution (87%) respondents were more likely than community college (78%) and proprietary school (76%) respondents to have indicated they consider college course materials, in general, to be overpriced.



Sixteen percent of the comments, or 96 comments, provided by students (of the nearly 600 comments provided by about 7% of all 8,800 respondents) on anything additional they wanted to share with regard to their college course materials experience revolved around course materials being too expensive. A higher percentage of these comments were from self-procurement or self-procurement and inclusive access respondents, but both those two groups represent the majority of respondents and comments.

#### **Student Comments:**

*Required college course materials create financial stress upon students who currently struggle to pay for high tuition costs.*

*The costs are so high that it impedes students from obtaining materials that are needed.*

*I think that class materials are overpriced. I usually rent and the books are still very expensive.*

*It makes going to college more difficult if we have to worry about purchasing college textbooks that most of the time are very expensive.*

*The course materials that I had to purchase were very expensive no matter where I went. It's difficult to put aside money to pay for these expensive course materials, so financial aid helps greatly.*

*A lot of college course materials are expensive and I was shocked at how much I was having to spend on a textbook I was lucky enough to be in a position where I could afford my textbooks but I see now the importance of financial assistance when it comes to things such as course materials.*

Forty-two percent of student respondents who obtained some to all required course materials through self-procurement indicated the cost of course materials had a negative impact(s). Of those, 16 percent reported they did not obtain a material due to cost, 14 percent took fewer courses, 10 percent earned a poor grade, 9 percent dropped or withdrew from a course, 8 percent avoided a certain major, 6 percent did not register for a specific course, and 4 percent failed a course.

Of note, 56 percent indicated they had to forego/skip other purchases so they could afford required course materials. So, 5 percent of all respondents who obtained some to all required

materials through self-procurement (84% of all respondents) did not obtain a material due to cost, 19 percent indicated they had to forego/skip other purchases so they could afford required course materials, 4 percent took fewer courses, 3 percent each either earned a poor grade and/or dropped or withdrew from a course, 2 percent each either avoided a certain major or did not register for a specific course, and 1 percent failed a course. Sixteen of all respondents, regardless of they obtained their required course materials, had to forego or skip purchases so they could afford required course materials.

**Table 10: Student Respondents - Impact(s) of Cost of Required Course Materials During the Fall 2021 Term**

	Overall	Self-Procurement Only	Self-Procurement (with Inclusive Access)
Did not obtain (purchase or rent) the required course material(s)	16%	15%	19%
Took fewer courses	14%	15%	13%
Did not register for a specific course(es)	6%	6%	6%
Dropped or withdrew from a course(es)	9%	9%	11%
Earned a poor grade(s) because could not afford required course material(s)	10%	10%	10%
Avoided a certain major because of higher course material costs	8%	8%	10%
Failed a course(es) because could not afford required course material(s)	4%	3%	4%
Had to forego/skip other purchases so I could afford required course materials	56%	57%	53%
No impact	58%	55%	62%
Other	8%	9%	7%

First-generation college respondents were somewhat more likely to have indicated the cost of course materials had an impact than respondents who were not first-generation, 44 percent compared to 39 percent. For those who reported that the cost of course materials did have an impact, the percentages by impact were similar regardless of college generation status. The percentages by race/ethnicity who indicated the cost of course materials had an impact on them during the fall 2021 term were within 5 percentage points of each other: Asian – 40 percent, White – 41 percent, Black – 43 percent, and Hispanic/Latino – 45 percent. Black respondents were more likely than overall respondents to have indicated they took fewer courses and/or dropped or withdrew from a course(es) (19% and 14% compared to 14% and 9%, respectively), and less likely to have indicated they had to forego or skip purchases to afford course materials (45% compared to 56% of overall respondents). White respondents were more likely than overall respondents to have indicated they had to forego or skip purchases to afford course materials, 64 percent compared to 56 percent, and Asian respondents were more likely than overall respondents to have not obtained required course materials due to cost, 27 percent compared to 16 percent.

Overall (based on students in all four course material models), 45 percent of respondents indicated they had to skip a purchase so they could afford course materials; some of the purchases forgone were for basic needs – 47 percent skipped food, 46 percent transportation expenses, and 26 percent some health-related expense. These percentages represent 21 percent, 21 percent, and 12 percent, respectively, of all respondents. Fifty-two percent indicated they skipped saving or debt reduction, which could have included paying down student loans, 50 percent a clothing purchase, 44 percent an “Other” education expense, 42 percent recreation, and 6 percent childcare. Similar percentages of respondents, regardless of college generation

status or race/ethnicity, indicated they skipped purchases for basic needs like food, transportation, and health-related expenses.

**Table 11: Student Respondents - Purchases Skipped in the Fall 2021 Term so Student Could Afford to Purchase Required Course Materials**

	Overall	1	2	3	4
Percentage of total who skipped a purchase	45%	47%	45%	51%	39%
Clothes, shoes, or other apparel	50%	48%	58%	54%	50%
Recreation (travel, dates, social activities)	42%	41%	53%	57%	36%
Other education expenses (upgrade computer, supplies)	44%	45%	38%	40%	46%
Savings and debt reduction (savings, investments, paying off debt and student loans)	52%	56%	42%	43%	52%
Food (groceries, meals)	47%	48%	37%	35%	51%
Health (doctor bills, prescriptions, insurance)	26%	26%	23%	25%	26%
Transportation (gas, car repairs, transportation needs)	46%	46%	41%	37%	50%
Childcare	6%	11%	10%	14%	11%
Other	3%	3%	1%	2%	2%

**1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access**

Sixty-four percent of all student respondents reported they were very likely (42%) or likely (22%) to switch to a digital course material format if there was a significant cost savings, 24 percent were somewhat likely, and 12 percent were unlikely (8%) or very unlikely (4%). The likelihood was similar regardless of the method of obtaining materials in the fall of 2021. Respondents who were not first-generation students were slightly more likely than first-generation

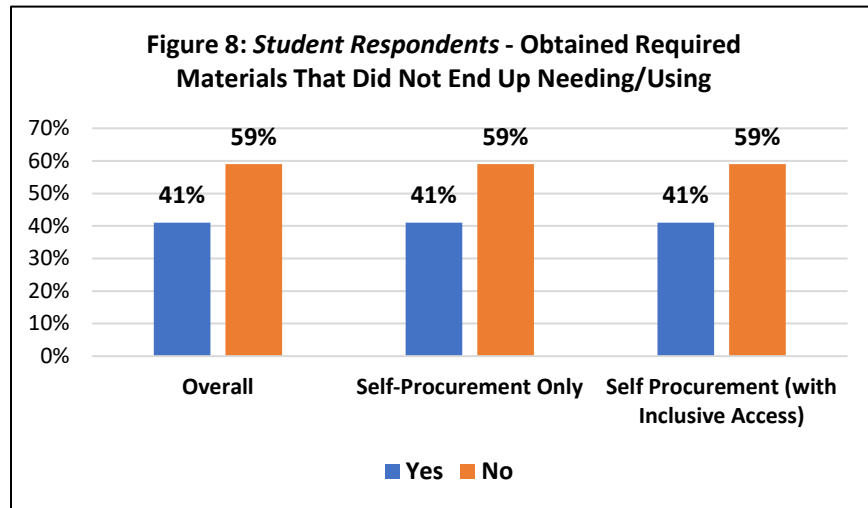
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**Sixty-four percent of all student respondents reported they were very likely (42%) or likely (22%) to switch to a digital course material format if there was a significant cost savings, 24 percent were somewhat likely, and 12 percent were unlikely (8%) or very unlikely (4%).**

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college respondents to have indicated they were very likely or likely to switch to a digital material format if there was a significant cost savings – 65 percent compared to 63 percent, and Asian (77%) and Hispanic/Latino (66%) respondents were more likely than White (61%) and Black (62%) respondents to have reported they were very likely or likely to switch to digital format if significant savings.

Of those students who obtained some to all required course materials through self-procurement (84% of all respondents), 41 percent reported they had materials they were required to purchase (or rent) that they did not end up needing/using. There was no difference by college generation status. Hispanic/Latino (44%), White (43%), and Asian (43%) respondents were slightly more likely than overall respondents (41%) to have indicated they obtained materials they did not end up needing/using, while Black (33%) respondents were less likely to have indicated not needing/using materials. Respondents at public universities and private non-profit institutions were much more likely than respondents at community colleges and proprietary schools to have reported obtaining required materials they did not end up needing/using, 49 percent and 45 percent compared to 33 percent and 27 percent, respectively.



Ten percent of the comments, or 60 comments, provided by student respondents (of the nearly 600 comments provided by about 7% of all 8,800 respondents) on anything additional they wanted to share with regard to their college course materials experience revolved around required course materials being irrelevant or not used in the course. About 10 percent of comments provided by self-procurement only, self-procurement and inclusive access, and campus-wide textbook rental program respondents, revolved around this issue; just 29 campus-wide equitable access program respondents provided a comment, and none of them had to do with this issue.

**Student Comments:**

*Textbooks are extremely expensive and not necessarily used/ helpful. Never read a chapter in my anatomy book because all her exams were based off the lectures and notes the teacher provided. It would be nice if they would tell you how mandatory or not a book will be to the course being taught. Some rely solely on you reading the material while others (like my anatomy class) are more lecture taught and do not rely heavily on at home readings.*

*Courses should not mandate course materials that will not be used or are not significant to that specific course.*

*I believe courses should include course materials that students must purchase only if they truly need them for the students to learn efficiently or if they use the technology for assignments if necessary. I have had countless of unnecessary book purchases from classes. We spend a lot of money on these books just for them to be opened once and never acknowledged in the classroom.*

*I think textbooks can be really helpful but a teacher should not require a textbook when they are only going to use a few chapters. They should be able to have a printable option that they give the students when they need them.*

*Often, only small portions of course materials are utilized, making it hard to justify paying full price for the entirety of such materials. Renting, when possible, makes the most sense when it comes to obtaining college course materials, in my opinion.*

*They are extremely expensive and some course materials are never used in the college course. It ends up being a complete waste of money and time.*

Over half of school respondents (56%) indicated that the cost of course materials at their institution is about right, nearly one-third (28%) that they are overpriced, 5 percent that they are underpriced, and 14 percent reported they are unsure about the cost of materials. The largest proportion of school respondents that rely on self-procurement only (49%), equitable access programs (67%), and a combination of self-procurement and inclusive access (67%) indicated that course materials at their institution are about right. The largest proportion of schools with campus-wide textbook rental programs (50%) reported that course materials at their institution are underpriced.

**Table 12: School Respondents - Determination as to Whether College Course Materials at Institution are Priced Fairly**

(Schools were to consider their responses to all of the questions regarding the types of course materials used at their institution, their students', faculty's, and staff's awareness of costs to students for course materials, and the costs to the institution to adopt any particular course materials model.)

	Overall	1	2	3	4
Overpriced	28%	30%	25%	17%	0%
About Right	54%	49%	25%	67%	67%
Underpriced	5%	0%	50%	17%	28%
Unsure	14%	22%	0%	0%	6%

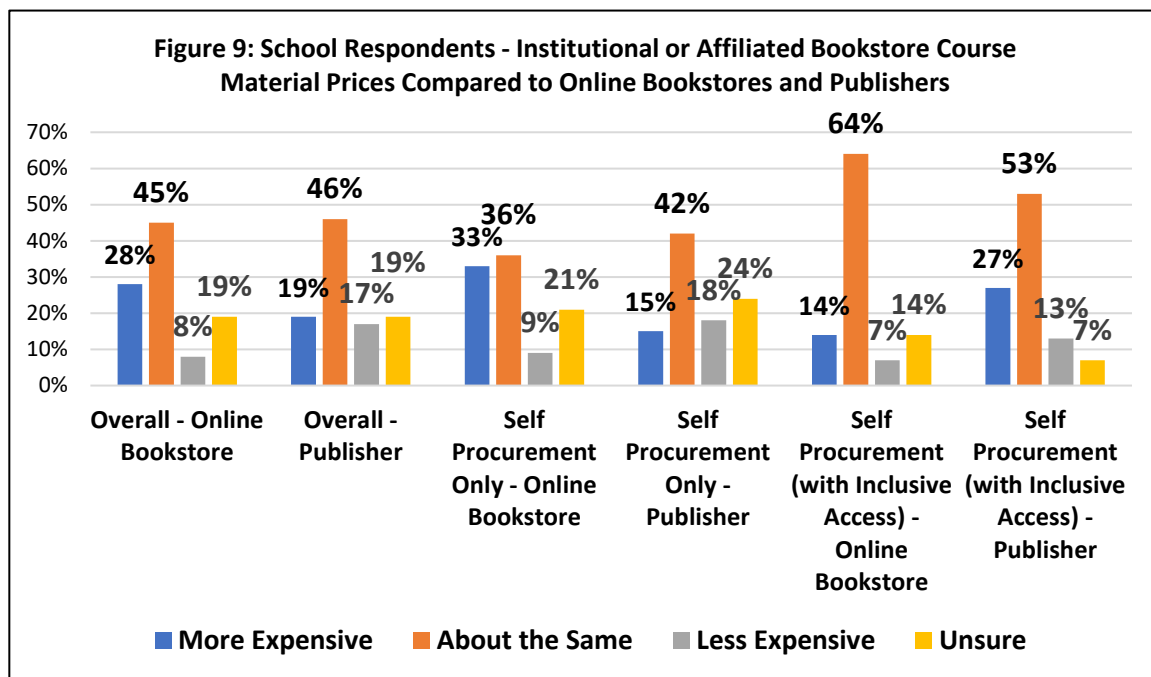
1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access

About one-third of self-procurement only schools reported course materials at their institution are overpriced, compared to 25 percent at campus-wide textbook rental program schools, 17 percent at campus-wide equitable access program schools, and none at self-procurement and inclusive access program schools. A little over half of all respondents (54%) commented/explained on what basis they made this determination. Three respondents each either indicated their determination was based on comparisons of costs at other schools or comparisons of costs to vendors/industry/similar sources, and two respondents each either reported their determination was based on the ability of students to purchase their materials or requests for financial aid to cover course materials. Other comments were more general in nature, including that course materials are overpriced, that the institution is doing things (like a textbook rental or equitable access program) to keep materials affordable, or that they don't have enough information to make this determination. The largest proportion of respondents in each sector indicated the cost of course materials at their institution is about right – 57 percent of community college respondents, 50 percent each of private non-profit institution and public university respondents, and 67 percent of proprietary school respondents.

By contrast, however, 33 percent of community college respondents, 33 percent of proprietary school respondents (1 school), 27 percent of private non-profit institution respondents, and 20 percent of public university respondents (2 schools) reported course materials at their institutions are overpriced. Twenty percent of both public university and private non-profit institution respondents, and 5 percent of community college respondents (1 school) reported they are unsure about the cost of course materials at their institution. One community college, one private non-profit institution, and one public university respondent indicated course materials at their institution are underpriced.



Self-procurement only and self-procurement (with inclusive access) school respondents were asked how their institutional or affiliated bookstore (if they have one) course material prices compare, on average, to prices from online bookstores like Amazon Books, Chegg, eBay, etc. and/or textbook publishers. Overall, the largest proportion of respondents indicated their course material prices were about the same as those from online bookstores and/or textbook publishers, 45 percent and 46 percent, respectively. Nearly one-third (28%) reported their course material costs were more expensive than online bookstore prices, and about one-fifth (19%) indicated their prices were more expensive than publisher prices. Eight percent of respondents reported their course material prices were less expensive than online bookstore prices, and 17 percent indicated their prices were less expensive than publisher prices. Nineteen percent of respondents reported their course material prices were less expensive than online bookstore prices, and 17 percent indicated their prices were less expensive than publisher prices. Nineteen percent of respondents reported they were unsure how their course material prices compared to online bookstores or publisher prices.



**Other Related Points of Interest from the Illinois School and/or Student Surveys:**

- Twenty-three of the 31 campus-wide textbook rental program (4 schools), equitable access program (6 schools) and inclusive access (13 schools) respondents (74%), provided an estimated average cost to the institution of providing the campus-wide program or of providing inclusive access for required course materials for one course/class. There may have been some confusion for schools in providing these estimates; the variance in amounts may suggest that some provided an average cost by student for one course, and some for all students for one course. Amounts varied from \$0, \$5.40, \$47 to nearly \$3 million. The estimated average and median costs provided varied widely overall and by how the institution provides course materials to the majority of students at their institution. The estimated overall average cost provided was \$180,419, and the overall median cost was \$1,840. Textbook rental program respondents provided an average cost of \$220,871 and a median cost of \$147,500, equitable access program respondents an average cost of \$63,378 and a median cost of \$3,108, and inclusive access respondents an average cost of \$240,490 and a median cost of \$800. Although institutions reported associated costs with facilitating rental, inclusive

access, equitable access and self-procurement models at an institution, these programs are self-funded through the margin which is calculated into the retail price. In addition, in many cases the bookstore acts as a profit center to assist in supporting institutional programs.

- Schools where the majority of students obtain their required course materials through self-procurement only or through self-procurement (with inclusive access), were asked if they feel it is advantageous for students to pay for course materials as a separate expense, rather than be included in the cost of tuition and fees. Thirty-five percent indicated they do feel it is advantageous, 19 percent do not, and nearly half (46%) reported they were unsure as to whether it is advantageous for course materials to be a separate expense for students.
  - Thirty-one respondents (52% of self-procurement only and self-procurement (with inclusive access) respondents) provided a variety of comments/explanations for their answer; most often mentioned, by eight respondents, was that course materials as a separate expense provides students with choice to rent/borrow and/or obtain the materials at the lowest price, seven respondents commented on the complexity of including a uniform course materials cost in tuition and fees due to the variability of materials (and their cost) by course or academic program, that it can be hard to return materials, and/or that sometimes a material is just recommended/not required, and four respondents commented they need to do more research on the concept of including course material costs in tuition and fees. On the flip side, three respondents each either commented that including course material costs in tuition and fees promotes first day access to materials and/or that it enables the use of financial aid for those materials, and two respondents suggested that the method can make it easier for students to obtain their materials.
  - Self-procurement (with inclusive access) respondents were much more likely than self-procurement only respondents to have indicated they feel it is not advantageous for course materials to be a separate expense for students, 44 percent compared to 8 percent.
- Schools, where the majority of students obtain their required course materials through inclusive access, or through a campus-wide textbook rental or equitable access program, were asked if they feel it is advantageous for students to have required course material costs included in the cost of tuition and fees, rather than be a separate expense. Eighty-one percent indicated they do feel it is advantageous, 19 percent do not, and no respondents reported they were unsure as to whether it is advantageous for course materials to be included in the cost of tuition and fees.
  - Twenty respondents (74% of inclusive access program and campus-wide textbook rental and equitable access program respondents) provided a variety of comments/explanations for their answer; most often mentioned, by 11 respondents, was that course materials included in tuition and fees means materials are available when students need them/when classes start, 7 respondents each either commented that costs included in tuition and fees enables financial aid/loans to be used for those costs and/or that students are better able to plan/budget for what total colleges costs will be, 4 respondents commented that including the cost in tuition and fees results in reduced cost/savings, and 2 respondents commented that the approach streamlines/simplifies the process of obtaining course materials for students.
  - All campus-wide textbook rental and equitable access program respondents reported they feel it is advantageous for students to have required course materials included in the cost of tuition and fees, compared to 71 percent of inclusive access respondents.
- Although 74 percent of respondents reported the cost of the campus-wide textbook rental program or equitable access program, or course(s)-specific inclusive access (charged to the

student) was not a set amount based on enrollment intensity/number of courses a student was enrolled in, that percentage does vary by how the majority of students obtain materials at the institution – 20 percent for campus-wide textbook rental program respondents, 67 percent for campus-wide equitable access program respondents, and 94 percent for inclusive access respondents.

- Of those (26%) respondents that did indicate the cost was a set amount based on enrollment intensity/number of courses a student is enrolled in, five textbook rental program respondents commented on the amount; four schools provided the cost per credit hour, which averaged to \$16, and one school indicated textbooks are available to students at no charge and are stocked in the study hall as needed. Two equitable access program respondents commented on the amount; one indicated the charge was \$100, and one reported the amount is based on which program/degree the student is enrolled in to determine which books are needed and charged. One inclusive access respondent commented on the amount; they indicated the charge is based on the material cost related to the specific courses.
- Eighty-nine percent of campus-wide textbook rental program school respondents and equitable access program school respondents, and inclusive access school respondents reported that the cost of course materials was included in students' tuition and fees cost/college bill.
  - All campus-wide textbook rental program and equitable access program respondents, and 82 percent of inclusive access respondents indicated the cost of course materials were included in students' tuition and fees cost/college bill.
- Forty-one percent of student respondents indicated the cost (of materials obtained through campus-wide textbook rental or equitable access, or inclusive access) was included in T&F/college bill, 33 percent said it was not, and 26 percent were unsure.
- Just 3 percent of all respondents indicated they were unsure about the primary source for funding materials in fall of 2021. Forty-five percent of respondents indicated the primary source for funding course materials was grants/scholarships, 25 percent cash and/or personal savings, 11 percent credit card(s), 10 percent loans, and 7 percent parent(s) or guardian(s). The percentage reporting use of grants/scholarships would be higher for this respondent group of MAP recipients than the overall Illinois undergraduate population, as MAP recipients are likely to also be Pell Grant recipients, and Pell can be used for other costs of attendance like course materials.
  - Students who obtained some to all materials through self-procurement were more likely to have indicated cash and/or personal savings and/or credit card(s) as a primary source of funding, and less likely to have indicated grants/scholarships, than students who obtained materials through a campus-wide textbook rental or equitable access program.
  - Forty-seven percent of first-generation college respondents and 45 percent of respondents who are not first-generation students reported grants/scholarships were the primary source of funding for fall 2021 term required course materials. First-generation college respondents were slightly more likely to have indicated they used cash and/or personal savings than respondents who are not first-generation students, 26 percent compared to 22 percent.
  - Grants/scholarships were also identified by the largest proportion of respondents from every race/ethnicity – 48 percent White respondents, 44 percent Black respondents, 38 percent Hispanic/Latino respondents, and 35 percent Asian respondents. Hispanic/Latino

(30%) and Asian respondents (27%) were more likely than White (22%) and Black respondents (20%) to have reported cash and/or personal savings was the primary source of funding. Hispanic/Latino (6%) and Asian (5%) respondents were less likely than White (11%) and Black (15%) respondents to have indicated loans were the primary source of funding for course materials. Asian respondents were more likely than respondents overall to have indicated credit card(s) (17% compared to 11%) or parent(s) or guardian(s) (12% compared to 11%) to have reported those as the primary sources of funding for fall 2021 term required course materials. There were also differences by sector; community college respondents (63%) were more likely than public university (35%), proprietary school (29%), and private non-profit institution (21%) respondents to have indicated grants/scholarships were the primary source of funding for course materials. This is likely because lower tuition and fees in the community college sector leave more financial aid available to pay other costs of attendance such as books and supplies.) There were also differences in the percentages who indicated cash and/or personal savings was the primary source of funding: private non-profit respondents– 37 percent, public university respondents – 27 percent, proprietary school respondents – 19 percent, and community college respondents – 15 percent. Respondents at proprietary schools were much more likely than respondents in the other sectors to have reported loans as the primary source of funding for course materials – 38 percent, compared to 12 percent each for both public university and private non-profit institution respondents, and 5 percent for community college respondents. Private non-profit respondents (16%) and public university respondents (12%) were more likely to have reported a credit card(s) as the primary source of funding than community college and proprietary school respondents (7% each).

- Sixteen percent of all respondents indicated they were unsure what portion of their materials cost was covered by financial aid in fall of 2021. Thirty-five percent indicated 100% was covered by financial aid, 28 percent none, 12 percent between 76-99%, 9 percent between 51-75%, 7 percent between 26-50%, and 7 percent less than 25 percent. Again, the percentage reporting coverage by financial aid would be higher for this respondent group of MAP recipients than the overall Illinois undergraduate population, as MAP recipients are likely to also be Pell Grant recipients, and Pell can be used for other costs of attendance like course materials. Students who obtained some to all materials through self-procurement were more likely to have indicated financial aid did not cover course materials or as much of course materials, than students who obtained materials through a campus-wide textbook rental or equitable access program.
  - Respondents who are not first-generation college students were less likely than first-generation college respondents to have reported none of their financial aid covered course materials (24% compared to 30%), and more likely to have indicated more than 50 percent of their course materials were covered by financial aid (60% compared to 53%). Similarly, White (25%) and Black (23%) respondents were less likely than Hispanic/Latino (35%) and Asian (33%) respondents to have reported none of their financial aid covered course materials, and more likely to have indicated more than 50 percent of their course materials were covered by financial aid (61% and 60% compared to 48% and 48%, respectively). There were also differences by sector. Community college (11%) and proprietary school (12%) respondents were less likely than private non-profit institution (54%) and public university (34%) respondents to have reported none of their financial aid covered course materials, and more likely to have indicated more than 50 percent of their course materials were covered by financial aid (77% and 63% compared to 30% and 48%, respectively).

## Other Related Points of Interest from National Data:

Available course material cost data varies by national or state report and is sometimes lower or higher than the course material costs calculated using the Illinois school and student survey data.

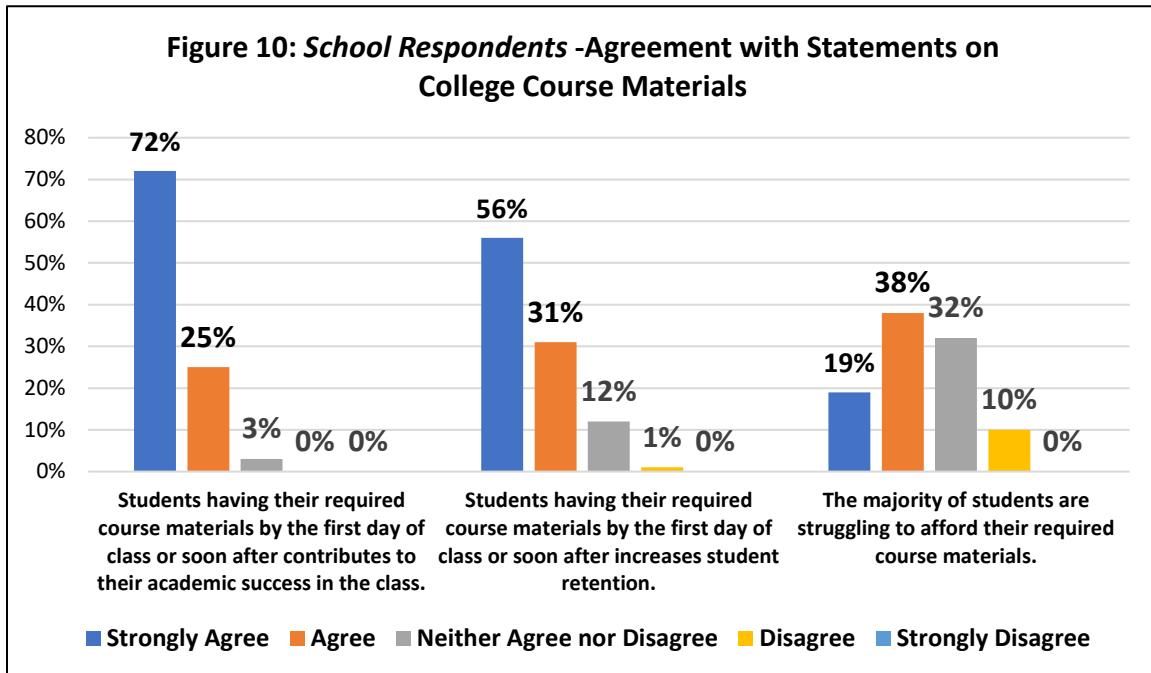
- NACS *Student Watch* 2022 Report: during AY21-22, 8.9 courses taken and 8.6 course materials purchased; \$339 total course spend; **cost of materials per course - \$38** (Student Watch, 2022)
- Fall 2020 Student Monitor Lifestyle & Media Study: the average student purchased or rented 3.8 printed or eTextbooks spending \$211 (**about \$56 a course**) (Lifestyle & Media, 2020)
- 2019 Tennessee Community College Student Course Materials Survey Report: **per course: \$119**; per semester: \$383 (Spica, 2020)
- 2018 Student Textbook and Course Materials Survey, Results and Findings (Florida Virtual Campus): In Fall 2017, 45.8 percent students spent more than \$301 on textbooks, and 14.7 percent spent over \$500. In Spring 2018, 43.8 percent students spent more than \$301 on textbooks, and 13.8 percent spent over \$500 (Florida Student, 2019)
- Open Educational Resources & The Cost of Required Course Materials in Four-Year Universities, December 2019 (Washington State Institute for Public Policy): **estimate around \$60 per course on average** (8-10 courses a year (full-time attendance) would cost an estimated \$480 to \$600) (Open Educational, 2019)

A Midwestern Higher Education Compact (MHEC) paper includes recommended practices developed for those who engage in OER efforts at the campus and university system levels to enable OER stakeholders and practitioners to calculate and communicate with more clarity and consistency the ROI of OER implementation. The related working group developed two frameworks to use when calculating and communicating cost savings attributable to the use of OER—one for assessing student cost savings and one for analyzing costs and benefits. These frameworks can provide consistency and clarity in how OER advocates and decision-makers talk about its impact. A difficult, but important step, in determining student cost savings is identifying and using the cost of the course material being replaced (Zaback, 2022). This may be good to keep in mind when trying to communicate the value of OER at Illinois schools, or the value of other course material models like campus-wide textbook rental or equitable access programs, or program- or course-specific inclusive access.

### 3. What is the equitable access achieved for students by providing all students with access to course materials on the first day of class?

Nearly all Illinois school respondents strongly agreed (72%) or agreed (25%) that students having their required course materials by the first day of class or soon after contributes to their academic success in the class, and 87 percent strongly agreed (56%) or agreed (31%) that students having their required course materials by the first day of class or soon after increases retention. Eighty to 100 percent of respondents, regardless of how the majority of students at their institution obtain their course materials, strongly agreed or agreed that students having their required course materials by the first day of class or soon after contributes to their academic success in the class, and/or strongly agreed or agreed that students having their required course materials by the first day of class or soon after increases retention. All public university respondents, 97 percent of community college respondents, and 96 percent of private non-profit respondents strongly agreed or agreed that students having their required course materials by the first day of class or soon after contributes to their academic success in the class. The 3

proprietary school respondents did not provide feedback for this question. All public university respondents, 78 percent of community college respondents, and 83 percent of private non-profit respondents strongly agreed or agreed that students having their required course materials by the first day of class or soon after increases retention. The 3 proprietary school respondents did not provide feedback for this question.



Seventy-three percent of community college respondents, 50 percent each of public university respondents and private non-profit respondents, and 33 percent of proprietary school respondents strongly agreed or agreed that students are struggling to afford their required course materials. An additional 40 percent of public university respondents, 23 percent of community college respondents, 38 percent of private non-profit respondents, and 33 percent of proprietary school respondents neither agreed nor disagreed that students are struggling to afford their required course materials.

Sixty-seven percent of all Illinois student survey respondents strongly agreed or agreed that having all required course materials by the first day of class (or shortly after) directly impacts how well they will do in the course, 21 percent neither agreed nor disagreed, and 12 percent disagreed or strongly disagreed that having materials by the first day of class (or shortly after) directly impacts how well they will do in a course.

The percentage of respondents who strongly agreed or agreed ranged from 82 percent of those who obtained materials through a campus-wide equitable access program, to 76 percent of those who obtained materials through a campus-wide textbook rental program, to 68 percent who obtained materials on their own and/or through inclusive access, to 63 percent who obtained all materials on their own. There were neither differences in the percentages who agreed nor disagreed by college generation status. White and Black respondents were somewhat more likely to have strongly agreed or agreed that having course materials by the first day of class (or shortly after) directly impacts how well they will do in the course (70% and 72%, respectively) than Hispanic/Latino and Asian respondents (63% and 55%, respectively).

**Table 13: Student Respondents - Having All Required Course Materials by the First Day of Class (or Shortly After) Directly Impacts How Well Student Will Do in the Course**

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
<b>Overall</b>	<b>37%</b>	<b>30%</b>	<b>21%</b>	<b>9%</b>	<b>3%</b>
Self-Procurement Only	34%	29%	21%	11%	5%
Campus-Wide Textbook Rental Program	44%	32%	17%	5%	1%
Campus-Wide Equitable Access Program	51%	31%	15%	2%	1%
Self-Procurement and Inclusive Access Program	38%	30%	23%	7%	2%

Sixty-eight percent of overall school survey respondents indicated students either always (20%) or usually (48%) have their required course materials by the first day of class or soon after, 28 percent that students sometimes have their materials, 2 percent that students seldom have their materials, and 1 percent said students never have their course materials by the first day of class or soon after. Schools offering inclusive access, or a campus-wide textbook rental program or equitable access program were much more likely than self-procurement only and self-procurement (with inclusive access) to have indicated students always or usually have their required course materials by the first day of class or soon after, 89 percent, and 100 percent each, compared to 54 percent and 61 percent, respectively.

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**Sixty-eight percent of overall school survey respondents indicated students always (20%) or usually (48%) have their required course materials by the first day of class or soon after; schools reported students who obtained materials through inclusive access, or a campus-wide textbook rental program or equitable access program, were much more likely to have their materials by the first day of class or soon after than students who obtained their materials through self-procurement.**

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All proprietary school respondents, 65 percent of community college respondents, 54 percent of private non-profit institution respondents, and 38 percent of public university respondents indicated students always or usually have their required course materials by the first day of class or soon after. Thirty-five percent of community college respondents, 39 percent of private non-profit institution respondents, and 62 percent of public university respondents reported students sometimes have their required course materials by the first day or soon after. The remainder of school respondents, two private non-profit institution respondents (7% of those school respondents) reported students seldom have their required course materials by the first day or soon after.

Ninety-three percent of school respondents reported students either always (45%) or usually (48%) have their required course materials provided through OER by the first day of class or soon after. The remaining 7 percent indicated students sometimes have their required course materials provided through OER by the first day of class or soon after. Ninety-three to 100 percent of respondents regardless of how the majority of students obtained required course materials at their institution, and 90 to 100 percent regardless of sector, reported students always or usually have their required course materials provided through OER by the first day of class or soon after.

Of those student respondents who obtained some to all of their required course materials through self-procurement, 67 percent reported all (32%) or some (35%) of their free materials

were available on the first day of class. It is possible, however, that the materials were available shortly after the first day of class.

**Table 14: School Respondents - Students Have their Required Course Materials (Through OER) by the First Day of Class or Soon After**

	Overall	1	2	3	4
Always	45%	33%	33%	100%	60%
Usually	48%	58%	67%	0%	33%
Sometimes	7%	8%	0%	0%	7%
Seldom	0%	0%	0%	0%	0%
Never	0%	0%	0%	0%	0%

1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access

Students who self-procured all or some of their course materials (84% of student respondents – all MAP grant recipients who are all lower-income students) were asked when they acquired their materials. Half reported they purchased the majority of those materials before the class(es) had started, and half purchased them after the class(es) started. There was little difference in the percentage who purchased their materials before the first day of classes by college generation status – 49 percent of first-generation college respondents compared to 52 percent of respondents who weren’t first-generation respondents. White respondents were much more likely than Black, Hispanic/Latino, and Asian respondents to have purchased their materials before the first day of classes – 62 percent compared to 49 percent, 39 percent, and 36 percent, respectively.

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**Students who self-procured all or some of their course materials (84% of student respondents) were asked when they acquired their materials. Half reported they purchased the majority of those materials after the class(es) had started, and half purchased them before the class(es) started.**

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Overall, 87 percent of student respondents who obtained materials through a campus-wide textbook rental program or equitable access program, or a course-specific inclusive access program indicated they had their materials available the first day of class or soon after. Notably, 92 percent of respondents who obtained their materials through a campus-wide textbook rental or equitable access program indicated they had their required course materials by the first day of class or soon after, compared to 84 percent of those who obtained their materials through inclusive access. First-generation college respondents were somewhat less likely to have indicated they had their course materials by the first day of class or soon after than respondents who were not first-generation college respondents, 86 percent compared to 90 percent. There was nearly a 10 percentage point difference in the percentage of respondents by race/ethnicity who indicated they had their course materials by the first day of class or soon after: White – 90 percent, Hispanic/Latino – 86 percent, Black – 84 percent, and Asian – 81 percent.

Of those student respondents who obtained their materials through self-procurement, who purchased the majority of their required course materials after classes had started, 43 percent wanted to ensure they would need the course material(s), 35 percent indicated the materials were not identified before the first day of class, and 16 percent wanted to ensure they weren’t going to drop the class; two reasons for waiting revolved around affordability – 45 percent wanted to check



other sources for a lower price, and 35 percent did not have the money to make the purchase. So, about 18 percent of all student respondents who obtained their own materials did so after classes had started because they couldn't afford to buy them before classes started. That represents 15 percent of total respondents.

**Table 15: Student Respondents – Reason(s) Student Waited Until After the First Day of Class to Purchase Any Required Course Materials**

	Overall	Self-Procurement Only	Self-Procurement (with Inclusive Access)
The required course materials were not identified before the first day of class.	35%	34%	38%
After class started, I knew I would need the course materials to succeed in the class.	43%	44%	41%
I wanted to check other sources for a lower price/used material.	45%	45%	46%
I didn't have the money to purchase the materials before the first day of class.	35%	36%	33%
I wanted to be sure I wasn't going to drop the class.	16%	15%	17%
I am a procrastinator.	6%	6%	8%
Other	7%	7%	7%

First-generation college respondents were more likely than respondents who were not first-generation college respondents to have indicated they waited until after the first day of class to purchase any required course materials because they did not have the money to purchase the materials – 37 percent compared to 30 percent. Black (44%) and Hispanic/Latino (38%) respondents were more likely to have indicated they waited to purchase materials because they didn't have the money than White (29%) and Asian (27%) respondents. Hispanic/Latino (50%) and Asian (57%) respondents were more likely than Black (39%) and White (41%) respondents to have indicated they waited to purchase materials because they wanted to check other sources for a lower/used price. Hispanic/Latino (45%) and Asian (53%) respondents were also more likely than Black (37%) and White (42%) respondents to have indicated they waited to purchase materials to ensure they would need them to succeed in the class. The lower than national average of institutions in Illinois who offer the ability for students to charge for their course materials on their bursar accounts may contribute to these barriers for low-income students with financial aid paperwork delays (Hershman, 2022).

#### Other Related Points of Interest from National Data:

Prior to the pandemic in 2020-21, the trend had been students obtaining their materials later and later each year. That trend reversed in 2020-21, with almost half of students obtaining their materials before classes started. This was likely connected to students obtaining their materials online during the pandemic instead of waiting to be on campus like a typical year. With campuses open again in 2021-22, students obtained their materials later than what was seen in 2020-21, but not quite as late as was seen in 2019-20. In 2021-22, 58 percent of students obtained their materials the week classes started or later, while 41 percent obtained the majority of their materials before classes began. Continued growth in institutional inclusive access and flat charge programs will likely lead to an increase in the percentage of students with access to course materials ahead of the first day of classes (Student Watch, 2022).

**4. What is the potential impact on academic freedom of faculty to be able to choose the most appropriate materials for their courses for each of the various methods of providing course materials?**

Respondents indicated that nearly 21,000 instructors/faculty taught undergraduate students at their institutions in the fall of 2021, with an average of 322 and a median of 235 per school respondent. Thirty-seven percent of instructors/faculty were at community colleges (average of 348 per school), 35 percent at private non-profit institutions (average of 235 per school), 24 percent at public universities (average of 567 per school), and 4 percent at the three proprietary schools (average of 303 per school).

Overall, 73 percent of all Illinois school survey respondents reported that faculty select whatever materials they want for their courses, 8 percent that faculty have some influence in the selection of their course materials, but do not make the final decision, 3 percent that faculty use materials selected by others at the campus level, and 16 percent indicated some other faculty role in selection of their course materials. The “Other” role in selection of materials most often mentioned by respondents was that faculty role in selection depends on academic department.

**Table 16: School Respondents - The Role of the Majority of Faculty in Selecting Required Course Materials**

	Overall	1	2	3	4
Faculty select whatever materials they want for their courses.	<b>73%</b>	86%	40%	80%	55%
Faculty select materials for their courses from a specified list and/or from a select publisher(s)/provider(s).	<b>0%</b>	0%	0%	0%	0%
Faculty use materials selected by others at the campus level.	<b>3%</b>	0%	0%	0%	11%
Faculty have some influence in the selection of their course materials, but do not make the final decision.	<b>8%</b>	6%	20%	20%	6%
Other	<b>16%</b>	8%	40%	0%	28%

**1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access**

Although faculty selecting whatever materials they want for their courses was the largest proportion of respondents regardless of how the majority of students obtain course materials at the institution, it varied from 40 percent for campus-wide textbook rental program respondents, to 55 percent for self-procurement and inclusive access program respondents, to 80 percent for campus-wide equitable access program respondents, to 86 percent for self-procurement only respondents. Of note is that 20 percent of both campus-wide textbook rental program respondents and campus-wide equitable access program respondents indicated that faculty have some influence in the selection of their course materials, but do not make the final decision, although 20 percent represents 1 school each. Also, 11 percent of self-procurement and inclusive access respondents (2 schools) reported faculty use materials selected by others at the campus level.

The largest proportion of community college (76%), public university (80%) and private non-profit institution (73%) respondents reported that faculty select whatever materials they want for their courses. Ten percent of community college respondents and 7 percent of private non-profit institution respondents indicated faculty have some influence in the selection of their course materials, but do not make the final decision. One of the two proprietary school respondents reported faculty select whatever materials they want for their courses, and one provided an “Other” role for faculty in material selection - faculty serve as subject matter experts for course developments and have input into the selected text for the course.

School respondents reported that just two percent of all faculty members (344 total faculty members), or a median of 1.0 faculty member per responding school, were using a textbook (print or digital) that they authored. Thirty-nine percent of those faculty members were at public universities, 27 percent community colleges, 26 percent private non-profit institutions, and 8 percent at proprietary schools; 30 percent were at one public university.

More than half (53%) of all school survey respondents reported the format preference for required course materials for overall faculty at their institution is traditional print, 18 percent print with a digital component (e.g., access code, online access, support), 17 percent digital textbooks, and 12 percent digital textbooks with digital extras.

**Table 17: School Respondents – Faculty Format Preference for Required Course Materials**

	Overall	1	2	3	4
Traditional print textbook	<b>53%</b>	56%	82%	39%	43%
Print textbook with a digital component (e.g., access code, online access, support)	<b>18%</b>	21%	12%	26%	11%
Digital textbook	<b>17%</b>	15%	4%	15%	24%
Digital textbook with digital extras	<b>12%</b>	8%	2%	20%	22%

**1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access**

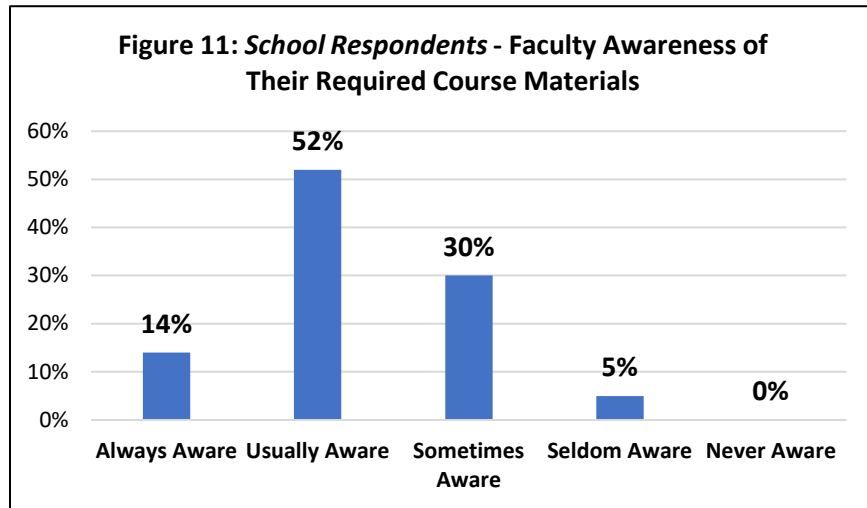
Campus-wide equitable access program respondents and self-procurement and inclusive access program respondents were more likely than self-procurement only and campus-wide textbook rental program respondents to have indicated faculty have a digital format preference, and campus-wide textbook rental program respondents were much more likely than self-procurement only, campus-wide equitable access program, and self-procurement and inclusive access program respondents to have indicated faculty have a traditional print textbook format preference.

Seventy-three percent of public university respondents reported that faculty prefer traditional print materials, while about half of community college (50%), proprietary school (48%, 2 schools), and private non-profit institution (49%) respondents reported that faculty preference. Forty-three percent of proprietary school respondents and about one-third of community college (34%) and private non-profit (28%) respondents indicated faculty prefer digital textbooks or digital textbooks with digital extras compared to 14 percent of public university respondents.

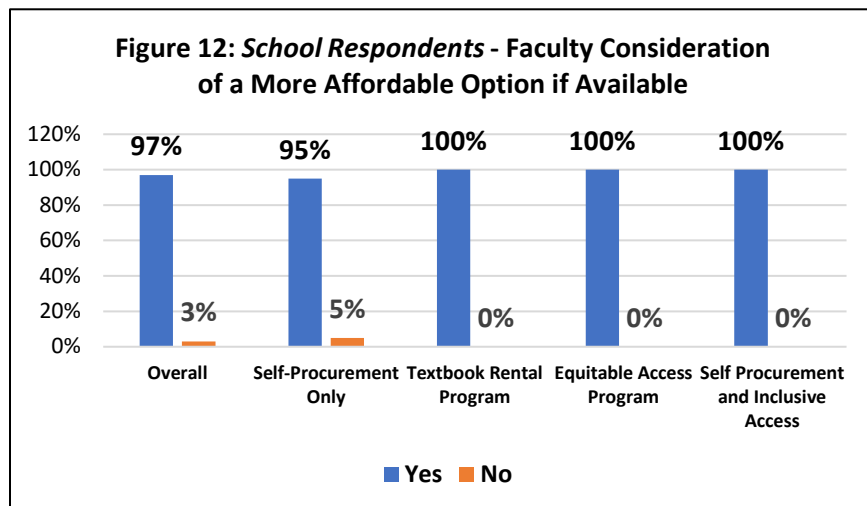
Data from the most recent NACS *Faculty Watch* report indicates preference for both standalone print and print with additional digital components primarily had to do with the student experience with the materials, either saying students learn better from these formats, or students themselves prefer them. Within the top reasons for both was also that the faculty were more familiar with print materials. Preference for digital materials centers around its convenience and ability to integrate homework or other course aspects with the materials. Within the top reasons for preference of both digital material types was also the lower cost to students (Faculty Watch, 2022).

About two-thirds of Illinois school survey respondents indicated that faculty, overall, are always aware (14%) or usually aware (52%) of the cost of course materials that they require for their courses, 30 percent are sometimes aware, and 5 percent seldom aware. No respondents indicated that faculty are never aware of the costs.

About 60 percent of campus-wide textbook rental program respondents and self-procurement and inclusive access program respondents indicated faculty, overall, are always or usually aware of the cost of course materials that they require for their students, compared to 68 percent of self-procurement only respondents and 80 percent of campus-wide equitable access program respondents. Sixty-eight percent of community college respondents, 76 percent of private non-profit institution respondents, and 40 percent of public university respondents indicated faculty, overall, are always or usually aware of the cost of course materials that they require for their students. Twenty-seven percent of community college respondents, 17 percent of private non-profit institution respondents, and 60 percent of public university respondents reported faculty, overall, are sometimes aware of the cost of course materials that they require for their students. Both proprietary school respondents that answered this question indicated faculty, overall, are sometimes aware of the cost of course materials that they require for their students.



Regardless of how the majority of students at an institution obtain their course materials, nearly all respondents (97%) reported that if faculty, overall, were offered a course material format that could be a more affordable option for students, they would consider using it. All public university and proprietary school respondents, 96 percent of community college respondents, and 97 percent of private non-profit institution respondents reported that if faculty, overall, were offered a course material format that could be a more affordable option for students, they would consider using it.



## Other Related Points of Interest from National Data:

The most recent annual NACS *Faculty Watch* report, conducted in the first semester of academic 2021-22 (representing, for many, a return to in-person instruction) reported 72 percent of faculty select the materials for the courses they teach (lower than the typical 80%+ reported most years). Thirty-five percent said they used a standard set of materials chosen by someone else on campus, and 12 percent said they used a standard set of materials chosen at the district, system, or state level (a measure that usually stays below 2%). Faculty reported being more interested in help from the campus store when it comes to course material options, with study participants most often mentioning help with understanding affordability of course materials and if more affordable options exist, and help learning about alternative course material models like inclusive access and OER.

Preferred formats among faculty and what they actually use in their courses do not always align. Faculty sometimes prefer a certain format themselves, but due to things like availability and campus initiatives, end up using a different format in their courses. Twenty-three percent indicated they prefer a standalone print textbook, 18 percent a print textbook with digital component (e.g., online access), 15 percent a digital textbook (e-book), 16 percent a digital textbook with additional digital component, 19 percent “it depends on the course,” and 9 percent indicated they have no preference. When faculty were asked their reasons for preferring each format, both standalone print and print with additional digital components primarily had to do with the student experience with the materials, either saying students learn better from these formats, or students themselves prefer them. Within the top reasons for both was also that the faculty were more familiar with print materials. Preference for digital materials centers around its convenience and ability to integrate homework or other course aspects with the materials. Within the top reasons for preference of both digital material types was also the lower cost to students.

Only a little more than half of faculty (57%) know the retail cost of all of the materials used in their courses (a little higher, 62%, when only looking at those who select the materials for their courses). This was down from prior years, but it is also less common for those teaching online to know the retail cost of materials, and 2021 did see more faculty teaching online than pre-pandemic levels. Sixty-five percent of faculty primarily teaching in-person knew the retail cost of all of their materials, compared to only 52 percent of those teaching online (Faculty Watch, 2022).

## 5. Describe the process required to implement each cost-saving method resulting from Question 1.

College Course Material Task Force members were asked to share their expertise in assisting with describing the processes required to implement the cost-saving methods included in Question 1.

### Campus-Wide Textbook Rental Program

The Eastern Illinois University (EIU) Textbook Rental Service Program has been around for decades, and is primarily a print textbook rental program with inventory housed at EIU. Based on textbook requests submitted by faculty and approved by their department chair, Textbook Rental Services purchases all required textbooks from a variety of publishers. The books are stored in a dedicated building. After registering for their courses, students print out their list of required textbooks and come to the textbook rental building where they pick up their own textbooks by matching the textbook reference number to that on their list. Students check out their own textbooks at a self-service checkout. At the end of the term, students return their textbooks

to Textbook Rental Services. Their textbook rental fee is charged \$9.75 per credit hour on their student account. Faculty must use the same textbook for the longer of 3 semesters or 2 years (Stowell, 2022).

## **Program- or Course-Specific Inclusive Access Program or Campus-Wide Equitable Access Program**

### **Step 1: Initiate program implementation**

Institution should pull together a committee of academic administration, LMS administrator, auxiliary services (campus bookstore or course material manager), bursar, faculty, course material providers and platform providers to determine implementation plan.

### **Step 2: LMS integration set up**

**Lead:** Campus LMS Administrator and/or Faculty

**Support:** Platform Provider Account Manager, Campus Course Materials Manager

Once adoption information is approved, the LMS administrator will install the Inclusive Access Platform Provider LTI tool within the campus LMS, and faculty will then enable the tool within their respective courses—giving students access to their required course materials. The Platform Provider also collects course IDs at this stage.

To make this setup process as simple and clear as possible, step-by-step integration instructions are provided for both campus LMS administrators and faculty.

### **Step 3: Collect & submit adoptions**

**Lead:** Campus Course Materials Manager, Course Material Provider (i.e. McGraw Hill, Pearson, Cengage, Wiley, Norton, etc.)

**Support:** Platform Provider Account Manager (i.e. Redshelf, Vital Source, Barnes and Noble, Follett, Ambassador, etc.)

**Involved:** Faculty

The campus Course Materials Manager will lead the adoption process for each program similar to how they manage the materials which are self-procured, however the platform provider may have tools and templates to leverage in communication with faculty to help streamline collection of adoptions. Course material providers will support this process with faculty to ensure timely submission of adoptions and necessary info. needed by the Course Materials Manager is provided. The campus Course Materials Manager will be involved in maintaining terms with the platform provider and course material providers, communicating with instructors to request adoptions, accepting faculty adoptions, and submitting the final information to the platform provider.

Throughout the adoption process, the Course Materials Manager can refer to the Platform Provider's knowledge database for self-serve assistance, submit a request for more individualized technical support, or reach out directly to his/her Platform Provider Account Manager.

### **Step 4: Source adoptions**

**Lead:** Platform Provider Account Manager, Course Material Providers

**Support:** Campus LMS Administrator  
**Involved:** Campus Course Materials Manager

The Platform Provider builds and maintains relationships with hundreds of course material providers to offer and continually expand a digital library of over one million titles. After receiving a school's adoption list, the Platform Provider will confirm course material availability, send and confirm pricing and deliver detail requests to course material providers, and test course IDs for accuracy. The school's Course Materials Manager will then be asked to review and approve all pertinent information.

### **Step 5: Initiate communications plan**

**Lead:** Course Materials Manager  
**Support:** Platform Provider Account Executive  
**Involved:** Faculty, Students, Course Material Providers

The school's Inclusive Access program will thrive when faculty and students fully understand the benefits and how to take advantage of them. Once courses have been successfully integrated and tested within the LMS, the Course Materials Manager will launch formal communications to critical stakeholders such as faculty, staff, and students.

Platform providers have developed a comprehensive communications guide to help faculty and students understand the program and the resources available to help them. The guide offers email templates and information on where to refer students with questions on technical issues, invoicing, opt in/out, and more. Timing may vary by campus based on when LMS course shells open. The Platform Provider Account Manager and representatives from the various course material providers will work directly with faculty to support a seamless running program.

### **Step 6: Launch courses**

**Lead:** Platform Provider Account Manager, Course Material Providers, and Course Materials Manager  
**Support:** Platform Provider Account Executive  
**Involved:** LMS Administrator, Campus IT Department

One of the greatest benefits of Inclusive Access is that students have access to course materials by the first day of class. The LMS Administrator and IT Department will determine the exact timing of a school's LMS course launch, but Platform Providers recommend going live at least one week before the scheduled term start date. Earlier launch dates give students time to get acclimated, while providing instructors more time to familiarize themselves with digital content and their Inclusive Access dashboard.

As a school's team prepares for launch, the Platform Provider and Course Material Providers will be working to ensure that the faculty and student experience is as frictionless as possible, minimizing any potential impacts on campus staff. Leading up to and after launch, the Platform Provider in conjunction with the Course Material Providers will test LMS IDs for accuracy and monitor and adjust for merged and dropped courses, opt-outs, or any other changes as needed-which will lay the groundwork for a smoother experience during billing and reconciliation.

## **Step 7: Perform billing & reconciliation**

**Lead:** Platform Provider Accounting Team

**Support:** Platform Provider Account Manager, Course Materials Manager

**Involved:** Students, Campus Billing Office

After the opting out deadline, the Platform Provider will work closely with the campus to ensure that all courses are included on invoices and to provide billing details that help best understand and interpret the financial impact of the program. Platform Provider technology will provide the Bursar's office with streamlined reports for efficient student account billing. Faculty and students will be directed to Platform Provider's Customer Experience team for general questions about the billing process, and to the Bursar's office for questions about individual student accounts.

## **Step 8: Evaluation & plan improvements**

**Lead:** Platform Provider Account Executive, Course Materials Manager

**Involved:** Academic Administration, Faculty, LMS Administrator, Bursar/Campus Billing Office

Having completed the term and now looking to the future, the Platform Provider Account Executive will partner with the school to improve and scale the IA program. Stakeholders are gathered to review successes and identify opportunities for the future. This process considers important inputs, including:

- Campus store and faculty feedback
- Support tickets submitted by students, faculty, and publishers (quantity and nature)
- Student opt-out rates
- Number of participating courses and professors
- Operational efficiencies
- Effectiveness of communication
- Total IA revenue
- Course revenue comparisons pre- and post-IA
- Student savings (print vs. digital vs. IA)

(Scotty, 2022)

## **Open Educational Resources**

The College of DuPage Open Educational Resources page provides numerous resources for schools to learn about OER, find OER, and create OER. Readings to get schools started include [Defining the Open in OER](#) and SPARC's [OER Myth Busting](#).

To find OER, OER metasearch tools (OASIS, Mason Metafinder, and Google Advanced Search) that query a variety of OER repositories or, in the case of Google, the open web, are suggested. Keeping a search narrow and, when possible, using search limiters or source selectors can result in more manageable results. Textbook collections are good starting points to browse collections of OER texts in a variety of disciplines. OpenStax is a pioneering effort out of Rice University. The terms of use for remixing and reusing are clear & easy. OpenStax "textbook projects" are developed and peer-reviewed by educators to ensure they are readable and accurate, are supported by instructor ancillaries, and are available with the latest technology-based learning tools. The books in the Open Textbook Library collection have been reviewed by faculty from a variety of colleges and universities to assess their quality. They can be downloaded for no cost or printed at low cost. OER repositories are curated collections that include all types of open resources such as textbooks, videos, instructional materials, and more. Some repositories



may be licensed but free resources, so one must read the license terms to use the material. OER repositories include: OER Commons, Florida Virtual Campus: The Orange Grove, Merlot II, and Skills Commons. OER content from various OER repositories may also be directly incorporated into the campus bookstore faculty course material selection platform so OpenStax, LibreText, Merlot and other sources appear alongside commercial materials for faculty to consider, select and submit for publishing the information for students.

Resources for creating and sharing OER include a Self-Publishing Guide: <https://urls.bccampus.ca/6cp> and <https://urls.bccampus.ca/6co>; the BCcampus Open Education Self-Publishing Guide is a reference for individuals or groups wanting to write and self-publish an open textbook. This guide provides details on the preparation, planning, writing, publication, and maintenance of an open textbook. To author open textbooks, this source: <https://press.rebus.community/authoropen> is a guide for faculty authors, librarians, project managers and others who are involved in the production of open textbooks in higher education and K-12. Content includes a checklist for getting started, publishing program case studies, textbook organization and elements, writing resources and an overview of useful tools. To modify an open textbook, <https://press.rebus.community/otnmodify> provides a five-step guide for faculty, and those who support faculty, who want to modify an open textbook. Step-by-step instructions for importing and editing common open textbook file and platform types are included. Finally, *A Guide to Making Open Textbooks with Students*, <https://press.rebus.community/makingopentextbookswithstudents>, is a handbook for faculty interested in practicing open pedagogy by involving students in the making of open textbooks, ancillary materials, or other Open Educational Resources. (College of DuPage Library, 2022)

CARLI's website also provides a wealth of articles, resources, and materials that may be helpful to those engaged in or planning to advocate for adoption of OER on their campuses: <https://www.carli.illinois.edu/products-services/collections-management/open-ed-resource-overview>. It includes background readings on the topics of OER and open pedagogy, shares CARLI members' websites that showcase their OER efforts, and helps libraries get started with handouts, rubrics, sample faculty and student surveys, and templates for stipend agreements. There is information for creating OER as well as information on Creative Commons Licenses and provides search sites that aid in helping find open textbooks and other OER (CARLI, 2022).

## **6. Describe the process by which students obtain required course materials.**

The following information generally describes the system that college and university students utilize to obtain course materials. Faculty, programs, and institutions decide what materials are required for college courses, and students must decide whether and how to pay for and obtain those materials to do well in college courses.

Once a student is enrolled in a college or university, the student receives an institutional e-mail address and very likely access to an account within the institution's learning management system (LMS). A LMS is a comprehensive software application (e.g., *Blackboard*, *Moodle*, *Sakai*, and *Canvas*) that handles the administration, documentation, tracking, reporting, automation, and the delivery of educational courses, training programs, or learning and development programs. Faculty and instructors populate shells within the LMS with course resources such as a syllabus, gradebook, discussion boards, due dates, and more. The required course materials are identified in a course syllabus, and are also often outlined within the institution's LMS on the students' personal "My Account" type of home page, and/or communicated through the student's institutional e-mail address, almost always prior to the start of the course(s).

There are several ways students can obtain required course materials, and that can often depend on what programs are offered at each institution. These methods generally fall into two categories - self-procurement or institution-provided. In some cases, both categories may be present at an institution. This depends on the course or program. The most common course materials acquisition model in higher education is a process where faculty and departments make course material choices and communicate those selections to their campus bookstores; bookstores then order the materials for their shelves (GAO, 2005). In this model, faculty usually make course material decisions independently as recognized experts in their field and include print publications available for purchase or rental via the campus bookstore and/or online providers, e-books and associated course materials via publishers for rent or purchase, free Open Educational Resources (OER), library-sourced materials that are free to students, and/or a combination of all of these options. The ability to select the format depends on the material type the faculty member chooses and/or what is available from the vendor and/or bookstore. Faculty and/or the campus bookstore make the titles, authors, dates of publication, ISBNs (E-ISBN for e-books), and other publication data available to students on or linked from the registrar's course schedule, the bookstore, syllabus, in the LMS, and/or via email so that they can purchase/rent materials through the bookstore and/or can find the course resources on their own, and/or faculty provide direct links to OER and library or free online materials, and/or faculty provide recommendations for accessing the materials. In many cases students, using their student ID are able to retrieve their personal list associated with the classes they have registered for.

Under the most common course materials acquisition model (i.e., determined by individual faculty or programs and made known to students), students in credit-bearing courses typically obtain most of their required course materials through self-procurement, either through purchasing, renting, borrowing other students' materials, or accessing portions of books or articles available for free in "preview" mode on such platforms as Amazon, GoogleBooks, GoogleScholar, Alibris, Barnes & Noble Campus, and other commercial course material sales sources. Depending on course requirements, students might obtain new or used, a print or electronic book or material, or even a subscription to an electronic material(s) through a publisher, which would be similar to renting an e-book. Students who are responsible for procuring their own course materials must decide how much they can spend on course materials, their preferred way of accessing information (digital or print), whether to maintain access to the information permanently (rent or purchase), whether borrowing from another student creates too much conflict if the student is in the same course, and whether reading free "previews" is sufficient to be able to perform well in the course. Again, the ability to select different formats depends on the material type the faculty member chooses and/or what is available from the vendor, bookstore, and/or online retailer. Although faculty, programs, and institutions intend for students to obtain all of their course materials by the first day of class, ultimately, students decide whether and when to obtain course materials. Students who procure their course materials on their own are responsible for returning any rented materials and may have the option to return a purchased material to receive a partial refund.

A college or university could instead, or also, provide the following options for obtaining required course materials in an institution-provided program, which are becoming more prevalent:

- A campus-wide textbook rental program. This model typically is a campus-wide program that provides access to primarily print and/or possibly digital materials. The cost usually is included in tuition and fees or a charge to the college bill, assessed on a per credit hour basis or an overall institutional program fee. Many of these programs allow a student to opt-out. There is a movement toward providing digital rentals. If the cost of the digital material is included in

tuition and fees or a charge to the college bill, the material is being offered through inclusive or equitable access.

- An inclusive access program (such as *IncludeED*, *Follett Access*, or *First Day*). This program is more commonly offered for select course(s). It provides first day access to mostly digital materials at a negotiated discounted price. The cost is assessed by course and usually is included in tuition and fees or a charge to the college bill. This format also allows a student the opportunity to opt-out.
- An equitable access program (such as *Follett Access* or *Barnes & Noble Complete*). This model is a campus-wide or degree-wide program as opposed to course-specific. Like inclusive access, this model provides first day access to mostly a digital format at a negotiated discounted price. Like a traditional campus-wide rental program, the cost is typically included in tuition and fees or a charge to the college bill as part of tuition, assessed on a per credit hour basis or an overall institutional program fee. This format often allows a student the opportunity to opt-out.

If the college or university offers a campus-wide textbook rental or equitable access program, or an inclusive access program for a specific course(s), students are informed as to how to obtain their required course materials and when they become available, which is prior to the start of the course. In the majority of inclusive access and equitable access programs, students access their digital course materials via direct links in their LMS, or through the direct provisioning of access codes via the LMS, that can then be used to access course materials at the URL also provided in the LMS. Additionally, students are informed on how to opt-out of these programs if they do not wish to procure their materials in this manner, and on how to return print materials at the end of the course(s) and/or on how long they have access to electronic course materials.

## 7. What are the current, future, and potential costs of the development and maintenance necessary for the utilization of any course material that is provided to students at no charge?

Sixty-four percent of all Illinois school respondents reported OER are being used for at least some required course materials at their institution, with 68,767 undergrads enrolled in at least one course that utilized OER in the fall of 2021, representing about 21 percent of all respondent undergrads.

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That percentage varied somewhat by how the majority of students obtain course materials at the institution – just 33 percent of campus-wide equitable access program schools (2 of the 6)

indicated OER are being used for at least some required course materials at their institution. Eighty-six percent of community colleges respondents and 80 percent of public university respondents reported OER are being used for at least some required course materials at their institutions, compared to 48 percent of private non-profit institution respondents and 33 percent of proprietary school respondents (1 school).

The majority of respondents (71%) indicated OERs used are a combination of OERs developed by their faculty and OERs available on OER repositories. Five percent reported all

faculty developed their own OERs, and 24 percent reported that all faculty used OERs available on OER repositories.

This was the case for self-procurement only, campus-wide textbook rental program, and self-procurement and inclusive access program schools. All campus-wide equitable access program school respondents (2 schools) reported OERs used are developed by their faculty. The majority of respondents by sector also indicated OERs used are a combination of OERs developed by their faculty and OERs available on OER repositories – 65 percent at community colleges, 77 percent at private non-profit institutions, and 88 percent at public universities. Another 30 percent of community college respondents indicated all faculty used OERs available on OER repositories. The one proprietary school respondent, and one community college respondent, reported all faculty developed their own OERs.

**Table 18: School Respondents: OERs Utilized by Faculty**

	Overall	1	2	3	4
All faculty developed their own OERs	5%	0%	0%	100%	0%
All faculty used OERs available on OER repositories	24%	22%	0%	0%	36%
A combination of both	71%	78%	100%	0%	64%

**1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access**

Forty percent of school respondents (8 of the 40 self-procurement only respondents, 7 of the 19 self-procurement and inclusive access respondents, 1 of the 6 campus-wide textbook rental program respondents, and 2 of the 6 campus-wide equitable access program respondents; by sector, 11 community colleges, 1 proprietary school, 3 private non-profit institutions, and 3 public universities) using OERs provided an estimated average cost to the institution of providing OER for required course materials for one course/class in the fall of 2021. The estimate was to take into account the staff time and resources used in order to offer the OER. Answers varied substantially, from \$0 up to \$60,000. The estimated overall average cost to the institution of providing OER for required course materials for one course/class in the fall of 2021, taking into account the staff time and resources, was nearly \$7,000 (with a median cost of \$500), but varied from \$534 (both the average and median cost of providing OER for one course/class) for a campus-wide textbook rental program respondent to an average cost for self-procurement only respondents of \$14,882 (and a median cost of \$1,750). It is important to note that although there is a cost associated with facilitating rental, inclusive access, equitable access and self-procurement models at an institution, these programs are self-funded through the margin which is calculated into the retail price. In addition, in many cases the bookstore acts as a profit center to assist in supporting institutional programs.

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**The estimated overall average cost to the institution of providing OER for required course materials for one course/class in the fall of 2021 was nearly \$7,000 (with a median cost of \$500).**

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The OER Degree Initiative was launched by Achieving the Dream (ATD) in 2016, with four grant partners and five funding organizations, to promote affordability and innovation at community colleges by supporting large scale OER adoption. Over two and a half years, the initiative supported 38 community colleges across 13 states (none in Illinois) in building degree pathways using only OER instructional materials. The 38 colleges nationwide offered 6,600 OER course sections over two and a half years, reaching nearly 160,000 students. Approximately 2,000

instructors participated in the development and delivery of these courses, and nearly 600 courses were redesigned and certified as OER saving an average of \$65 per course (Griffiths, 2020).

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**Data from the OER Degree Initiative indicates OER courses took about 180 hours on average to develop, with a compensation cost (salary and benefits) of developing OER courses averaging \$12,600. The full cost of developing an OER degree pathway averaged \$576,000 during the 2.5-year grant period according to 5 schools that provided detailed cost data.**

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Launching OER courses demanded institutional efforts, and instructors bore the brunt of the workload. It took much more time than developing traditional courses (OER courses took about 180 hours on average to develop, with a compensation cost (salary and benefits) of developing OER courses averaging \$12,600). Colleges invested a substantial amount of their own resources both directly and indirectly through staff and instructor time to develop OER programs. While implementation costs at institutions ranged from \$300,000 to \$1 million, an average of \$576,000 over the 2.5 year period was spent at five partner institutions that contributed detailed cost data (an average cost per student of \$70, which declined rapidly as enrollment in the OER courses increased – down to \$21). The most cost-efficient

courses were non-STEM courses created by adapting existing OER materials or adopting open textbooks (Griffiths, 2020).

About 40 percent of respondents (5 community colleges, 2 proprietary schools, 17 private non-profit institutions, and 5 public universities) provided a reason(s) for not currently utilizing OER. Reasons overall, for not currently utilizing OER, from highest to lowest percentage were time needed to develop and/or maintain OER (59%), cost to develop and/or maintain OER (48%), low interest from faculty (34%), system capabilities/accessibility/internet access (28%), lack of support for course design/implementation (24%), low interest from administration (10%), and/or language barriers (3%). Another 38 percent of respondents identified some other reason they are not currently utilizing OER. Most often mentioned was that the OER materials are considered lower quality or that OER are not available for the type of courses taught at the institution. Although based on a smaller number of respondents, the breakdowns by sector were similar; public university respondents were somewhat more likely than the other sector respondents to have indicated cost was a reason for not currently utilizing OER, and community college respondents were somewhat more likely than the other sector respondents to have indicated low interest from faculty and/or lack of support were reasons from not utilizing OER.

**Table 19: School Respondents - Reason(s) Institutions are Not Currently Utilizing OER**

	Overall	1	2	3	4
Time needed to develop and/or maintain OER	<b>59%</b>	86%	50%	20%	50%
Cost to develop and/or maintain OER	<b>48%</b>	71%	50%	20%	33%
Low interest from faculty	<b>34%</b>	36%	50%	40%	33%
Low interest from administration	<b>10%</b>	14%	0%	0%	17%
Lack of support for course design/implementation (IT staff, design team, etc.)	<b>24%</b>	36%	0%	20%	17%
System capabilities/accessibility/Internet access	<b>28%</b>	43%	0%	20%	17%
Language barriers (OER materials not available in non-English format)	<b>3%</b>	7%	0%	0%	0%
Other	<b>38%</b>	29%	50%	80%	33%

**1=Self-Procurement Only; 2=Textbook Rental Program; 3=Equitable Access Program; 4=Self-Procurement and Inclusive Access**

More than half of all respondents (38 schools) provided a comment with regard to the types of policy or implementation challenges that are most prevalent at their institution in the development and/or maintenance of formal OER initiatives. Ten respondents (26%) mentioned time/faculty time to develop/maintain OER as a challenge, eight (21%) mentioned funding/cost issues, and four (11%) mentioned limited staff/staffing shortage as a challenge. All of these challenges could be perceived as funding issues. Three respondents each (8% each) either mentioned faculty perception/interest as a challenge or challenges due to faculty having the academic freedom to choose their own course materials. Several respondents mentioned promising practices in the OER policy area: one has formed a committee to create and maintain OER repositories (time and money have been challenges), one has had conversations with other schools utilizing OER, and identified some best practices, one has a team of faculty, staff, and administrators currently participating in the American Association of Colleges & Universities (AAC&U) OER Institute funded by the Hewlett Foundation and are proactively working on developing a large scale OER awareness campaign and OER adoption, and one established a taskforce in spring 2021 to explore textbook and course materials cost reduction with the purpose of exploring ways to create a pathway to OER development for faculty.

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**Eighty-four percent of respondents reported that either no institutional funding was dedicated to formal OER in academic year 2021-22 (67%), or \$1 to \$10,000 was dedicated (17%) to OER, and 86 percent of respondents reported their institution has not been awarded grant funding from external sources for the explicit purpose of implementing OER.**

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Eighty-four percent of respondents reported that either no institutional funding was dedicated to formal OER in academic year 2021-22 (67%), or \$1 to \$10,000 was dedicated (17%) to OER. Five percent indicated \$10,000 to \$25,000 of institutional funding was dedicated to OER (2 community colleges and 1 public university), 3 percent \$25,001 to \$50,000 (1 community college and 1 public university), and 2 percent \$50,000 to \$75,001 (1 private non-profit institution). Seven percent, or four schools (2 community colleges and 2 private non-profit institutions), reported more than \$100,000 in institutional funding was dedicated to formal OER in academic year 2021-22.

Eighty-six percent of respondents reported their institution has not been awarded grant funding from external sources for the explicit purpose of implementing OER. The 14 percent of respondents that reported they have received grant funding from external sources were all either self-procurement only schools (5 schools – 4 public universities and 1 private non-profit institution) or self-procurement and inclusive access schools (4 schools – 3 community colleges and 1 public university).

Eighty-six percent of respondents reported their institution has not been awarded grant funding from external sources for the explicit purpose of implementing OER. The 14 percent of respondents that reported they have received grant funding from external sources were all either self-procurement only schools (5 schools – 4 public universities and 1 private non-profit institution) or self-procurement and inclusive access schools (4 schools – 3 community colleges and 1 public university).

### **Other Points of Interest from the Illinois School or Student Surveys:**

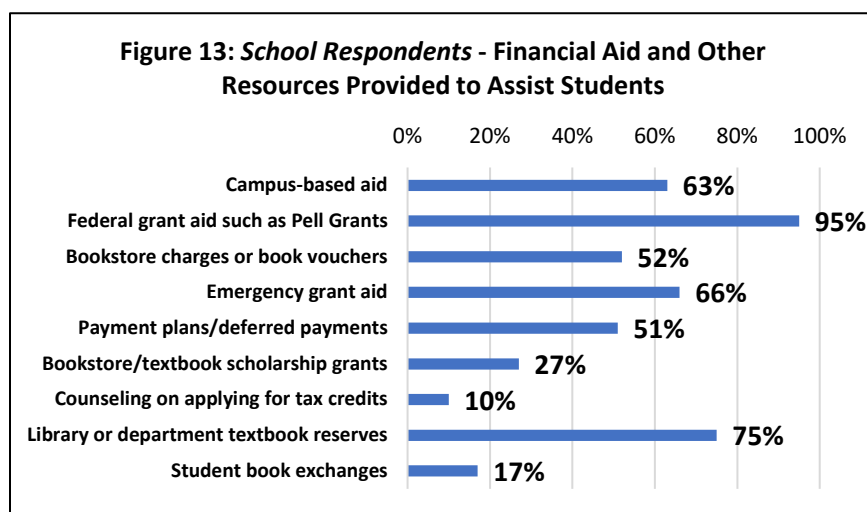
- Thirty-five percent of respondents provided an estimated course material cost savings to undergraduates in the fall of 2021 resulting from utilizing OER. According to the data provided by respondents, an overall median cost savings of \$89 per student was accomplished through OER utilization (\$59 per student in self-procurement only schools, \$75 per student in one campus-wide textbook rental program school, \$100 per student in one campus-wide equitable access program school, and \$95 per student in self procurement and inclusive access program schools)) OERs often provide first-day access to digital materials for students with ability to access digital materials. These savings do not factor in students obtaining print copies of OER, which can account for around 13 percent of students with an average cost of \$33 per book (Griffiths, 2020).

## 8. Identify best practices resulting from the cost-saving methods resulting from Question 1.

About 40 percent of all responding schools (31 schools) offered either a campus-wide textbook rental program (6 schools), a campus-wide equitable access program (6 schools), or program- or course-specific inclusive access (19 schools); in addition, 64 percent of school respondents reported OER are being used for at least some required course materials at their institution. Comments shared in the school survey and presentations given to the CCM Task Force indicate that schools consider some of these programs to be best practices.

School survey responses indicated that many course materials are the responsibility of the student to procure. The majority of schools have an institutional or institutional-affiliated bookstore, and the counts provided by schools indicate that schools are offering course materials in formats that are often cheaper than purchasing new print materials. Although 49 percent of all purchases/rentals through the campus bookstores are for new print purchases, the other half are for used print purchases, digital purchases, new print rentals, used print rentals, and digital bundled subscriptions, which school respondents reported cost the students less, on average.

Additionally, many school respondents are providing financial aid and other resources to assist students in affording course materials. Ninety-five percent indicated they are providing federal grant aid such as Pell grants, which can be used for other costs of attendance like course materials once tuition and fees are covered, 75 percent library or department textbook reserves, 66 percent emergency grant aid, 63 percent campus-based aid, 52 percent bookstore charging or book vouchers, 51 percent payment plans/deferred payments (i.e. veterans book check delays), 27 percent bookstore/textbook scholarship grants, 17 percent student book exchanges, and 10 percent counseling on applying for tax credits that may offset the cost of course materials. Twenty-two percent of respondents indicated some other financial aid or resources, and a some of those respondents commented on the variety of those other resources; most often mentioned were institutional aid or other scholarships.



Schools were asked to provide additional thoughts related to college course materials and/or cost saving course material initiatives/best practices. The comments were analyzed by how the majority of students at the institution obtain their college course materials. Five self-procurement school respondents indicated some trepidation in moving away from self-procurement only:

### **Schools Comment:**

*If students pay for their own course materials they are more likely to use them. Sometimes this means they will mark in them or destroy the book.*

*Without assurance that the (different) format is both more affordable and of comparable content and quality, it is unlikely that faculty would consider using it.*

*We believe that there is room for using multiple methods of reducing course materials costs: using openly licensed materials, inclusive access in select programs, "equitable" access options, and rentals. Digital-only does not appeal to our faculty or students at this time. We also know that our students prefer choice. Across the board inclusive access would be very much resisted at our institution.*

*Digital may not always support student success. This is a complex issue with lots of variation.*

*While course materials are vital to the success of students to provide a blanket approach is not advantageous to all students. Some disciplines have very little course material costs over the first two years and then increased costs year 3/4 while others have little to no cost all four years. It would be unfair to require a student with little to no cost for their program to pay for the high cost of another student's textbooks due to an across the board fee/policy.*

Four self-procurement school respondents provided support for looking at other ways to improve the college course materials experience, and two self-procurement respondents indicated they are looking at/researching other models:

*Anything that can be done to lower the cost to students would be welcomed as long as the quality is the same.*

*It is understood that the costs of course materials can be significant for our many of our students. We also believe students having access to these materials on the first day of class is beneficial and contributes to their academic success.*

*Many of us support what we perceive as the aims of this effort, which is to examine the cost of education, beyond simply tuition.*

*The cost of course materials is concerning. Please share what you learn from this survey.*

*We are currently investigating other models.*

*We are working on creating options and making the materials more reasonable.*

Three self-procurement only respondents provided examples revolving around best practices in this area:

*Barnes & Noble offers all kinds of formats students can buy/rent.*

*City Colleges of Chicago ensures that students who face financial hardship have access to resources. Faculty are encouraged to adopt textbooks several weeks in advance of the semester, and students can use financial aid towards textbooks via book vouchers. Additionally, our agreement with the bookstore ensures that desk copies of all textbooks are available to students through the library as of the first day of each semester/term.*

*Some textbooks are used in multiple courses throughout the curriculum. These are purposefully monitored and communicated.*



Three campus-wide textbook rental program respondents provided examples revolving around best practices in this area, and one provided a suggestion:

*Our Strategic Plan includes increasing recruitment of a diverse student body and having sustainable practices that protect the University's financial assets. Developing OER as a resource on campus aligns strongly with these goals and the work that we have done so far raising awareness about OER on campus as well as the incentive program for faculty to develop or implement OER we believe will lead us on a path to success. In addition, it will give us an opportunity to fiscally and strategically support our student-centered faculty to create materials tailored to their courses and current events; and showcase their talents, research, and expertise on a global scale with little cost. Utilizing OER that speaks directly to course outcomes and provides the best content for engaging students in innovative ways demonstrates faculty commitment to the University but, moreover, to the students they serve. Our commitment to access and success has been a long-standing practice and our distinguished Textbook Rental Program is an example of such a practice. However, the current model which depended upon the ability to reuse textbooks for a set period, is no longer sustainable as electronic textbooks or materials that require the use of a unique access code have become extremely costly, threatening the viability of the Textbook Services financial model. As our university continues to seek additional equity minded admissions and retention practices such as test optional admission and additional student support personnel, it is a goal to continue to find ways to ensure that student debt and attrition due to financial circumstances is minimized or eliminated and we hope our efforts to increase OER use across campus will lead us closer to achieving these goals.*

*Students at Lake Land College pay a credit hour fee for textbook rentals and a small percentage of materials are purchased by the students.*

*Textbook Rental Service program for students.*

Three campus-wide equitable access program respondents provided examples revolving around best practices in this area:

*It's advantageous to students for us to include course materials in tuition. Tuition is market-driven, but net tuition is considerably lower (per the net price calculator).*

*We negotiate for better discounts through our vendor by bundling textbooks and digital resources.*

*We went to a campus wide approach a two years ago where we calculated the cost of the course materials into the cost of the tuition so students can put their FA towards the course materials. Before that, many of students were not purchasing their books and failing the course because they couldn't afford to buy the books.*

One self-procurement and inclusive access program respondent provided support for looking at other ways to improve the college course materials experience, and one provided an example revolving around best practices in this area:

*I appreciate the time and effort it took to develop this survey. I'd like to see the statewide data results, and am interested in what happens next. Perhaps in 3-5 years, we will see positive impact if this survey is repeated. My library colleagues and I are at the beginning stage of our efforts, and look forward to collaborating with colleagues throughout the College in support of OER usage and creation by faculty and students.*

*We offer rental programs, book buyback and sell used books in addition to the cost savings from inclusive access. It's difficult to deal with the price increases passed on from the book publishers.*

Highlighted below are a number of other “best practices” in the college course materials cost-saving area and/or information from reports or organizations that have established best practices in this area. These were collected through review of existing research and/or through presentations given to the CCM Task Force. Links to all Task Force presentations are included in Appendix D.

### Best Practices from Secondary Research and Presentations at the CCM Task Force

- The **Consortium of Academic and Research Libraries in Illinois (CARLI)**, is a network led by the U of I System that makes open textbooks and other resources available to students through CARLI’s 127 member libraries statewide, including all Illinois public universities, community colleges, 67 private colleges and universities, and 8 special research libraries. CARLI member libraries serve 90 percent of Illinois undergraduate students, 41 percent are minorities. **Open Illinois** is an initiative of the CARLI that encompasses the following:
  - Grant management
  - Member of the Open Education Network
  - OER Commons
  - Continuing education programs for librarians and faculty/instructors

CARLI partners include the Illinois Board of Higher Education, Illinois Community College Board, Illinois Department of Commerce and Economic Opportunity, Illinois Library Association, University of Illinois Division of Disability Resources and Educational Services, University of Illinois Press, Secretary of State/Illinois State Library, Health Sciences Librarians of Illinois, CARLI’s OER Committee, and CARLI’s member institutions. CARLI’s **goals and objectives to accomplish with these partners** include:

1. Eliminate textbook costs for high-enrollment courses in the focus area in CARLI member institutions
  - Produce accessible Creative Commons-licensed OER textbooks and associated learning objects for students, faculty, and staff
2. Improve student learning outcomes by increasing the use of open-source materials by including personal learning experiences
  - Collect and publish rich data about OER use for the purpose of advocacy, analysis, and planning
3. Develop local expertise about OER and ancillaries creation, publishing, dissemination, adoption, and use
  - Engage CARLI member institutions in writing OER
4. Create a scalable OER model that can be replicated across multiple disciplines and institutions
  - Engage CARLI member institutions through participation in professional development

CARLI indicates that **sustainability of Illinois SCOERs** (Support for Creation of Open Educational Resources) can be accomplished through:

Building:

- a model as a statewide consortium
- expertise at member institutions
- community

Allowing for:

- less duplication of effort
- sharing of best practices
- coordination of efforts towards shared statewide goals

The organization views the foundation for the future of these efforts as CARLI's OER Committee and the addition of grant project staff into CARLI's permanent operation. (Craig, 2022)

- In June of 2021, the **University of Illinois (U of I) System was awarded \$1.08 million from the U.S. Department of Education's Open Textbooks Pilot Program** – a competitive grant program based on U.S. Senate Majority Whip Dick Durbin's (D-IL) Affordable College Textbook Act. The funding is supporting the creation and expansion of the use of open college textbooks. More specifically, the grant will fund Illinois SCOERs (Support for Creation of Open Educational Resources), a program that will provide access to open textbooks and personalized learning tools for entry-level courses in high-demand health care and human development career paths. The program will be administered by CARLI. Illinois SCOERs will provide a new holistic support model that will promote student success through OER awareness, implementation, growth, and adoption. Senator Durbin has helped secure \$24 million for the Open Textbooks Pilot Program over the last four years. The University of Illinois System is one of nine grant recipients nationwide selected for Fiscal Year 2021 ("University of Illinois," 2021).
- **College of Lake County and College of Du Page have both participated in the OpenStax Institutional Partnership Program**, a Rice University initiative committed to improving access to free, high-quality, peer-reviewed open educational resources. Through the partnership, OpenStax provides the college with individualized consulting, strategic planning services, training and support as well as access to their free textbooks, and institutions must demonstrate willingness to drive adoption of OER. In the 2018-2019 academic year, College of Lake County indicated the partnership had impacted 8,661 students, bringing the total student savings from OER to \$853,715 per year ("College of Lake County," 2018). According to OpenStax, the institutions that join as institutional partners increase on average the number of students impacted by 158 percent after completing the first year of the program, and to date, the program has resulted in \$19.6 million of additional student savings from open educational resources ("College of DuPage", 2019).
- A presentation given on OER in Illinois higher education by representatives from the Illinois Board of Higher Education (IBHE), the Illinois Community College Board (ICCB), and the College of DuPage highlighted many promising initiatives in the OER area currently underway. Illinois higher education leaders have attended a Midwestern Higher Education Compact (MHEC) summit on OER implementation and policy to learn about progress in surrounding states, and they held an Illinois Community Colleges OER Summit to discuss institutional and statewide collaboration around OER. They have furthered collaboration and coordination in the OER area by joining the MHEC Illinois OER State Action Team and MHEC OER for CTE (career and technical education) Working Group, and they formed the Illinois OER Stakeholders Group. The Illinois OER Stakeholders Group released the first ever OER in Illinois Higher Education Survey in 2020 to assess the status of OER usage and integration in higher education institutions. Late in 2021, ICCB and IBHE coordinated an Illinois Senior Leaders Seminar on Open Education with MHEC sponsorship and led by the Open Education Network (OEN). ICCB is supporting OER in the CTE area, providing learning opportunities around OER, and has supplied grants to the Office of Community College Research and

Leadership (OCCRL) to develop the “Fostering Access, Affordability, and Equity: A Primer on the Role of Open Educational Resources in Illinois Career and Technical Education” report and a manuscript on findings from the exploratory study on the perceptions on the rate of adoption and OER in CTE programs of study and diffusion of innovation (Spies, 2022).

- Task Force members from the **Association of American Publishers**, **Pearson Higher Education**, and **McGraw-Hill Higher Education**, as well as a representative from **W. W. Norton** presented on how they are **addressing college course material affordability and equity**. A summary readout of that session is included below. It’s important to note that all publisher representatives presenting indicated that inclusive access has resulted in cost savings for students in the seven figures over the last several years of inclusive access’ existence as an institutional partnership relationship. While different publishers might have different approaches and focal points, it was clear during this presentation that publishers in general are working to address affordability by providing content through a variety of options at a variety of price points to further support student, faculty, and institutional choice. Publishers indicated that they are committed to providing leading, quality materials that are inclusive, accessible, secure, and affordable.

**Association of American Publishers (AAP):**

- Education publishing over the last decade: according to AAP, course materials today result in lower costs and positive outcomes: <https://publishers.org/wp-content/uploads/2022/09/IA-Success-Stories-2022-Update.pdf>
- There have been two major shifts in the industry: 1) print to digital 2) affordability & access
- Shift 1: Print to Digital; The 21st Century Global Shift to Technology:
  - Resulted in publishers creating digital materials/e-books and engaging digital learning resources to assist faculty in meeting the varying learning styles of the 21st century student.
  - Today publishers create courseware which contains the e-book, various digital learning resources, assessments and reporting for faculty and students.
- Shift 2: Affordability & Access; Publishers are working to address affordability through innovation and options:
  - Publishers develop options like e-books, loose-leaf and custom print options, as well as offer course material delivery models like rentals, inclusive access and equitable access that provide first-day access to course materials and at a low cost.
  - They indicated these innovations and increased offerings give faculty and students more options to choose which learning modality works best for their course and the student’s individual academic and financial needs.
  - As a result, the AAP reported student spending on course materials has dropped significantly in the past decade.
  - Supports Textbook Transparency laws and has supported related legislation in Texas and Oregon.

**W.W. Norton:**

- Working to provide more affordable options and more opportunities for student success through digital, inclusive access, equitable access, rental, custom, and low-cost print.
- Conducted a survey of 560+ adopters of Norton’s digital learning tools, that found the majority of instructors moving online felt supported, three-fourths of instructors found their experience with Norton’s digital tools superior, and about two-thirds of instructors saw a positive change in student learning after assigning Norton’s learning tools.

**Pearson:**

- Pearson indicated they partner with institutions to create personalized learning experiences for students. Their values drive their commitment as they work to provide affordable, accessible, and effective solutions for the betterment of learners everywhere.

<https://www.pearson.com/content/dam/one-dot-com/one-dot-com/us/en/files/ia-exp-student-spotlight-lupo.pdf>

- Their three Commitments were highlighted and the work/areas of focus under each:
  - Educational Equity: diversity, equity & inclusion; accessibility; and affordability - -- In fact, Pearson reports that e-book pricing has decreased 25% since 2020 and courseware in IA as much as 30%, depending on the curriculum of study.
  - Making an Impact: learning science; results & efficacy; content & authorship; customer success; support; and sustainability
  - Educator Enrichment: Digital Learning NOW; teaching toolkits; and online teaching strategies

**McGraw-Hill Higher Education:**

- McGraw-Hill highlighted their focus on Quality and their work to provide trusted content that works, indicating their materials are:
    - Evidence-based, peer-reviewed, and continually updated for relevancy - attention to DEI
    - Written by 14,000 leading subject matter experts, authors, and educators
    - Expertly curated with instructional design for teaching and learning
  - Their efforts in the Workforce Readiness area was highlighted, as they work to provide tools that build student success skills for the real world. They shared that tools are catered to different career paths, to help set students apart from their peers as they enter the job market:
    - Building Problem Solving & Critical Thinking Skills: Application-based activities, simulations, and case studies that assess decision-making and teach real-world cause and effect
    - Developing Analytical Skills: Statistical software, data visualization, and excel tools, that help develop learners' ability to analyze and communicate data
    - Refining Communication Skills: Tools supporting students in writing efficiently and improving their presentation skills, both individually and in teams
  - McGraw-Hill talked through their Personalized Learning Technology that works to address varying levels of student preparedness. Within that are performance dashboards highlighting areas of needed intervention:
    - Technology powered by AI works individually with each student to fill knowledge gaps, create personalized paths, and pace learning.
    - Differentiated instructional approaches, active learning, and engagement tools that tailor to the different ways of learning.
  - They shared their efforts in maintaining the highest security and privacy standards in the industry, LMS integration, attention to accessibility, and ensuring products/services are mobile ready.
  - Their work in the Inclusive Access area was shared and outcomes they are seeing from this work:
    - Reduce Costs and Improve Student Performance with Inclusive Access | McGraw Hill Higher Education (mheducation.com).
    - Working with over 1,400 institutions to deliver course materials through Inclusive Access, resulting in over \$500M in student savings on McGraw Hill materials between 2018 and 2021.
    - Having access to critical learning resources on the first day of class helps improve retention and overall success in the course by 20%. (Denson, 2022)
- A presentation shared at the May CCM Task Force meeting providing an overview of inclusive access, which is a partnership between institutions of higher education and their campus

bookstores, digital course materials distributors, and/or content providers to deliver quality digital-first content on (or before) the first day of class, at prices that are below competitive market rates, provided **best practices for a successful inclusive access program**:

- Institution-wide education and understanding of the distribution model: Student Government, Faculty and Deans Offices, Provost, Bursar's Office, Student and Academic Affairs Offices, LMS/IT Teams, etc.;
- Over-communication across partners and stakeholders;
- Local branding and marketing ("Immediate Access," "Day 1 Access," etc.);
- Start small, Grow, Scale;
- Tight Learning Management System technical integrations for coded/codeless courseware delivery; and,
- Strong support for customer success, with access to customer service embedded within content delivery platforms.  
(Scotty, 2022)

- A presentation shared at the May CCM Task Force meeting outlined **recommendations from the June 2020 University of Illinois Urbana-Champaign Provost Committee Course Material Cost Task Force Report**:

- Institutional Priority. Department chairs can identify Affordability Champions for institutional awards.
- Faculty Awareness. All faculty should be expected to know the real costs that students pay for their recommended and required course materials.
- Financial Incentives. A grant program to provide faculty financial incentives to adopt or create free or dramatically less expensive classroom materials has proven very successful with aspirational peers.
- Faculty Training. Orientation and training on less expensive course materials must be the responsibility of an office with regular seminars and individualized assistance.
- Student Awareness. "Course Explorer" (the online resource that includes the university's course catalog and schedule) should include course material information to guide student choices during registration.
- Book Order Forms. The sooner that faculty know the materials they will adopt, and communicate that information to the bookstore, the greater the likelihood that the Illini Union Bookstore can find inexpensive options in the marketplace to meet faculty and student needs.
- Illini Union Bookstore Services. We must raise faculty awareness of bookstore services like online ordering with free pickup, customized course pack assistance, Amazon partnership and immediate access email-delivered digital codes.

Additionally, the presentation included information on **a \$25,000 grant the university provided to the library to provide OER incentive grants to instructors to adopt (\$500), adapt (\$2,000), or create (up to \$6,000 per professor) OER materials**. Four courses for 2022-2023 have been funded, which will impact about 2,280 students per year, saving them approximately \$246,770 in textbook costs each year (an average of about \$108 per student per year). Also underway is the hiring of an OER Librarian as a Visiting Assistant Professor for three years in the UIUC Library.  
(Benson, 2022)

- The Scholarly Publishing and Academic Resources Coalition (**SPARC**) is a **non-profit advocacy organization that supports systems for research and education that are open by default and designed to be equitable, like open educational resources (OER)**. SPARC's membership includes more than 200 libraries and academic organizations across

North America, including the following Illinois libraries: Association of College & Research Libraries, Illinois Wesleyan University, Northwestern University, University of Chicago, University of Illinois at Chicago, University of Illinois at Urbana-Champaign, American Theological Library Association, and College of DuPage. SPARC suggests the following be **considered when a school is thinking through how course materials are offered to students**:

- Be proactive. Make sure admin, faculty, and students are aware of all initiatives to reduce the cost of course materials and their benefits.
- Ask questions. Thoroughly examine the legal, financial, and ethical implications of new models.
- Be rigorous. Ensure all claims about benefits and savings are backed up by independent evidence, including research and numbers.
- Center equity. Put student needs and voices at the center of the conversation – there is always time to consult and listen.

SPARC offers the following **states to learn about OER from, as well as an OER State Policy Tracker tool on their website**:

- Georgia. Statewide affordable learning program with central support unit for faculty and staff.
  - Colorado. Statewide OER council that administers a successful OER grant program
  - Massachusetts. Statewide OER advisory council that coordinates among institutions and offers grants and professional development.
  - Texas. Transparency law for OER and IA programs and a statewide OER grant program.
  - Idaho. Board policy for course material access and transparency and “zero textbook cost” degrees.  
(Allen, 2022)
- The 2018 Washington Legislature directed the Washington State Institute for Public Policy (WSIPP) to study open educational resources and the cost of textbooks and required course materials. They found that grant programs are one of the most common methods to incentivize OER efforts on campuses and compensate librarians, faculty members, and others for a portion of their time. The 2018 Washington Legislature provided funding to the Washington Student Achievement Council (WSAC) to administer the Open Educational Resources Grant Pilot Program. The aim of the program was to expand the availability of affordable learning materials for students. Grantees were required to use funds to “create a designated campus coordinator” to be the point person on OER for the school and/or “support faculty to adopt and modify, or create new, open educational resources.” In January 2019, two universities, Western Washington University and Central Washington University received \$36,000 each to support OER efforts. The Academic Technology Department at Western Washington University used the funding to provide a week-long summer workshop, led by librarians, instructional technologists, and instructional designers. Faculty were trained on how to license OER, adapt materials, create their own work, and publish content. Participating faculty received \$4,000 stipends to attend the workshop and collaborate with staff to transform the course curriculum using OER for five courses. The Brooks Library at Central Washington University used grant funding to provide participating faculty members \$1,000 stipends, which faculty used to help adapt OER for 26 general education courses. The goal of the project was to provide students an additional option to complete general education requirements by enrolling in courses with no-or-low cost course materials, in place of traditional commercial

textbooks. Through their research and conversations, they identified several other options that individual institutions can consider, should they want to increase the use of OER:

- One option is for **department leaders to consider OER activities within their promotion and tenure policies** as a way to encourage faculty to use OER and demonstrate broader institutional support.
- **Increase awareness among students** - librarians at Central Washington University and Western Washington University have **worked with staff within registration offices to develop a system that identifies courses that use low-or-no cost course materials** so that students have the option to register for courses that use OER materials.
- **Establish clear policies at institutions around the use and development of OER and the importance of educating staff and faculty about these policies.** For example, the Office of the Provost at Washington State University has established an OER policy that outlines faculty's autonomy to select OER materials, copyright and open licensing requirements when adopting and creating materials, who provides technical support, and how to share materials. Policies endorsed by department and college leaders could help clarify the appropriate use of OER materials across campuses and help define roles for librarians, faculty, and staff using OER.  
(Hansen, 2019)

- MHEC's paper and recommended practices in it were developed for those who engage in OER efforts at the campus and university system levels to enable OER stakeholders and practitioners to calculate and communicate with more clarity and consistency the ROI of OER implementation. The paper cites information from SPARC's State Policy Tracker - **in 2021 alone, states considered more than 30 legislative proposals or budget items related to OER. In addition, since 2010, more than 30 states have passed legislation related to OER, and at least 25 states have established OER initiatives and invested in the development or implementation of OER.** The number of legislative measures designed to support OER, or other low-cost course material development and implementation, continues to grow. There are three major themes in the legislation supported by states over the last decade:

- Study and plan for OER: Many states require either a central entity or individual institutions to study and create a plan for implementing OER or otherwise reducing textbook costs.
- Invest in OER initiatives: States have invested funds into OER efforts, creating grant programs that support creation, implementation, and training efforts.
- Require institutions to identify (or mark) courses with OER or other low-cost options: A growing number of states require institutions to identify which courses use free or low-cost course materials in their course schedules or registration systems, a practice known as "course marking."

**Since 2018, the federal government has also distributed more than \$15 million through the Open Textbooks Pilot Program.** This program supports institutions in creating new open textbooks and expanding the use of open textbooks in courses. It emphasizes savings for students through sustainable, expanded use of open textbooks in high-enrollment courses or in programs that prepare individuals for careers in high-demand fields. Additionally, as the benefits of OER have become clearer, faculty awareness has grown, and students have become advocates. Many systems and institutions have found ways to fund local OER efforts. **The MHEC working group identified six principles for understanding key factors related to cost savings from OER:**



- **What you need to know depends on where you sit**, so OER advocates should tailor information to audiences and the decisions those audiences make.
- **Access to course materials should be equitable**, so cost savings calculations should assume all students have acquired them from the start of the course rather than utilizing actual access.
- **Costs should account for implementation costs unique to OER**, so the cost of developing OER should be viewed in the context of—and if possible, be aligned with—ordinary revisions to courses institutions make.
- **Adopting/adapting existing OER can reduce costs**, so institutions should take advantage of catalogs of OER and recycle any internal processes they build in creating new OER.
- **OER supports learning as well as commercial resources**, so students can receive a high-quality education when their courses utilize OER.
- **OER benefits may extend beyond student cost savings**, so a full understanding of OER's value may mean considering learning outcomes as well as consequences for equity and completion.

Additionally, the working group developed two frameworks to use when calculating and communicating cost savings attributable to the use of OER—one for assessing student cost savings and one for analyzing costs and benefits. These frameworks can provide consistency and clarity in how OER advocates and decision-makers talk about its impact. (Zaback, 2022)

- **OhioLINK is Ohio's statewide academic library consortium, connecting print and digital collections among its 90 member institutions (virtually all non-profit higher education institutions in the state) and managing statewide collaborative library and student success services. One of OhioLINK's statewide affordable textbook initiatives for higher education, Affordable Learning Ohio, encompasses Open Educational Resource (OER) support and advocacy, as well as statewide pricing for commercial textbooks, and use of library materials as textbook replacements whether acquired and shared at the consortial level or on individual campuses. OhioLINK struck price agreements (not content purchases) at the statewide level (initially) with six major publishers: John Wiley & Sons, Inc., McGraw-Hill Education, Pearson, Macmillan Learning, Cengage, and Sage, for inclusive access commercial textbooks and courseware. Price agreements are reviewed and renewed annually based on analyses of competitive pricing for inclusive access against the new, used, and rental market nationally. At the same time, OhioLINK promoted statewide OER adoption by providing an OER platform (a customized instance of OER Commons) and expertise as a member of the Ohio Open Ed Collaborative, funded by a \$1.3 million grant from the Ohio Department of Higher Education. A coalition of institutions and higher education faculty, librarians, researchers and instructional designers developed 23 OER course packs to enhance existing OER material, add new OER assets, promote adoption, and assess use. After the first year, the biggest takeaway was: OER adoption results in the biggest cost reduction for students; inclusive access scales much faster to reduce costs for more students across more disciplines in more institutions. A hybrid approach has more impact at scale. The hybrid approach resulted in dropping costs for over 90,000 students statewide for a total cost savings of over \$14 million dollars (or around \$155 in savings per student) in little more than a year (\$3,643,770 in savings resulted from OER and \$10,607,879 from Inclusive Access). (Evans, 2018; Evans, 2020)**

- **Eastern Illinois University (EIU) Textbook Rental Service (TRS)**
  - By the numbers:
    - \$8M (Inventory of books in textbook rental)
    - \$309,000 (Annual cost of bond fee for building (that houses books))
    - \$1,371 (Average cost of textbooks and materials for IL Publics)
    - \$9.75 (Cost per credit/hr TR at EIU, which is \$300/year at 30 credits)
    - 60 years (oldest book in inventory - Last of the Mohicans)
    - 2014 last time TR fee changed (and it went down a bit)
  - Textbook Rental Policy:
    - Textbooks purchased by TRS
      - Faculty select textbooks for course
      - Must be used the longer of two years or three semesters of scheduled use
    - Students
      - Billed \$9.75/Credit Hour
      - Can't write in, highlight, or underline text in books
  - Student textbook rental fee increased 23 percent over a fifteen-year period (2005 and 2019)
  - In FY20 TRS revenues and expenses netted to \$0
  - **EIU started an Ebook/OER Pilot Program in the spring 2022 semester**
    - Pilot Group, Students
      - Ebook, N = 88 (11 courses)
      - Digital OER, N = 65 (9 courses)
    - Ebook costs were limited to about \$35
    - Students were surveyed, and asked, if given a choice between a printed textbook and a digital textbook, which they would prefer. Results, based on a 30 percent response rate, indicate 42 percent somewhat (22%) or strongly (19%) prefer a printed textbook, 38 percent somewhat (18%) or strongly (20%) prefer a digital textbook, and 21 percent have no preference. (Stowell, 2022)
  
- **Waubonsee Community College *MyMaterials* (Inclusive Access)**
  - Textbook affordability is a mechanism used by institutions nationwide to discuss and address the high cost of course materials that are often barriers for student success and academic momentum.
    - Ongoing strategies include:
      - OER/Zero-cost (classes that utilize online videos, PowerPoint slides, lecture notes, websites, etc. in place of a textbook)
      - Custom textbooks (textbooks are formatted to include only the portion of the textbook that will be used in the course)
      - Textbook rental (textbooks are rented at a fraction of the selling price and returned at the end of the semester)
      - Library services (online databases, reserve copies of textbooks with limited checkout, eBooks)
  - ***MyMaterials* is Waubonsee's version of an Inclusive Access program, which is designed to get students the correct course materials at the lowest price.**
  - Students pay a fee upon registering for particular courses and then get access to the materials needed online via their tablet, laptop or desktop computer.
  - This program often saves students up to 50% off of standard textbooks.
  - How it works: students register for a course; students are charged a fee; students receive an e-mail with information; digital materials are delivered to students; and, students can choose to opt-out.

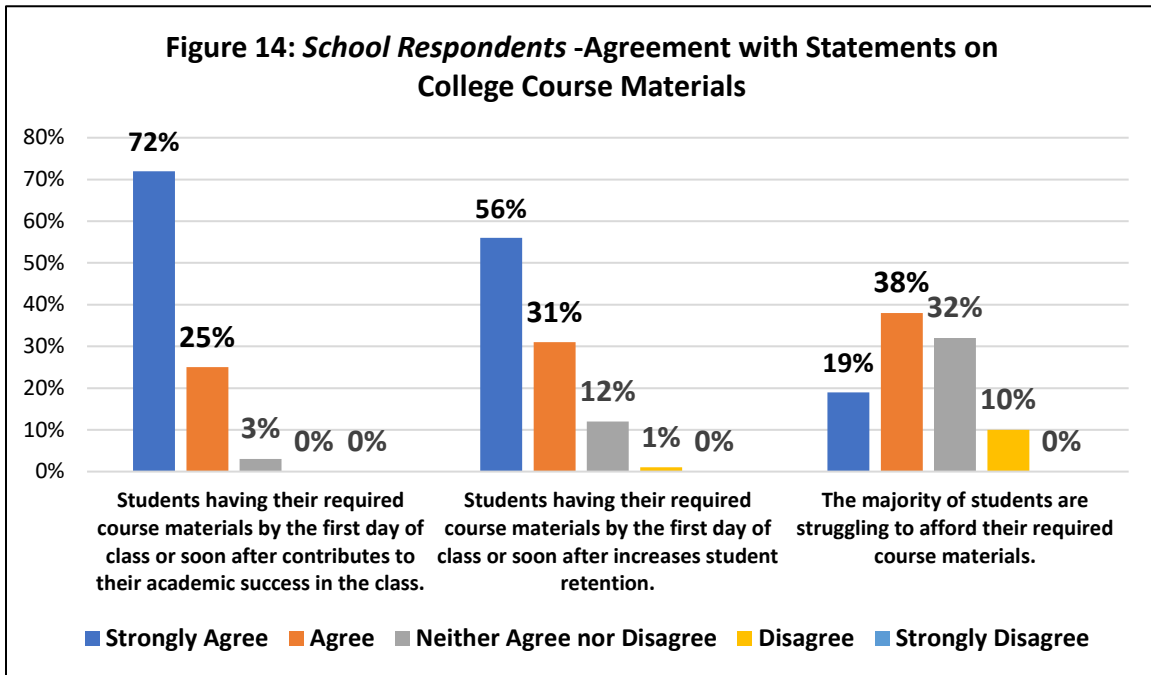
- Waubonsee has a 3-phase evaluation plan for *MyMaterials*.
- There are 8 publisher partners for *MyMaterials*; Cengage (41.7%) and McGraw-Hill (38.3%) are providing the most materials.
- *MyMaterials* has saved 14,470 students \$275,397 from fall 2019 through spring 2022.
- Survey results:
  - Students
    - 88% recommend taking a *MyMaterials* course to a friend
    - 77% were satisfied with *MyMaterials* information provided on Registration website
    - Over 80% were satisfied with the ability to pay for course materials as part of tuition
    - Almost 80% were satisfied with access to course materials on 1st day of class
    - 80% were satisfied with the convenience of the program
  - Faculty
    - 83% of faculty understood the purpose of program
    - 79% of faculty understood how the *MyMaterials* works
- (Moreno, 2022)
- **Campus Bookstore Perspectives**
  - Newest Student Watch data indicates student course material spending is down to \$339 for 2021-22, compared to \$456 in 2020-21
  - College Stores:
    - Are a resource to assist everyone on campus in making informed decisions based on academic freedom, availability, format, cost, and accessibility.
    - Work in close partnership with faculty and other stakeholders and the vendor community to facilitate more affordable course material adoptions and ordering and innovations.
    - Manage complex logistics to ensure that course materials specified by professors are available before classes start in a wide variety of formats.
    - Provide students with accurate information for making informed decisions.
  - Faculty have more options and information to make informed choices:
    - Faculty have more options in the marketplace to choose from including more affordable commercial course materials and openly licensed materials.
    - A new generation of course material discovery, selection, and price saving tools are being deployed by campus bookstores to support this effort.
    - These tools are feature rich systems that allow faculty to research and select course material, look at product reviews from peers, understand costs to students and options.
    - More effort to make this process easier and less time consuming for faculty to improve on-time selections.
  - Campus bookstore adoption platforms are becoming more powerful and can integrate with library resources and OER repositories.
  - Students have greater information and lower cost options:
    - Most campus bookstores today provide students a choice between new, used, rental, digital options and information on how to obtain materials at no cost such as open educational resources (OER) or library resources.
    - Institutions and bookstores are negotiating sustainable lower cost and improved delivery models.
    - New online and in store software platforms, mobile websites, QR codes and LMS integration are further enhancing the student customer experience.
    - Single click opt-in and opt-out of negotiated lower cost options.
    - More than 1,000 colleges and universities offer online marketplaces allowing students to shop online at the campus store and from a variety of online sellers simultaneously from the campus store's website.

- Several thousand stores also offer price match guarantees including matching the prices of Amazon and other online booksellers.
  - Additional efforts at campus bookstores:
    - Accessibility
    - Supporting research and improving efficacy and value
    - Making financial aid more efficient and go farther
    - Maximize tax credits
    - Advocating for sales tax exemptions
 (Hershman, 2022)
- **Textbook Affordability at the College of DuPage**
  - Timeline
    - 2017: Research Study
    - 2018: OER Summit Illinois Community Colleges
    - 2019: Formation of OER Steering Committee, goals for pilot initiative, Board approved yearly budget.
    - 2019-Present: Grant-funds published 54 projects by 118 faculty members. Outreach to 1700 full and part time faculty. Saved students \$3M in textbook costs.
  - OER Steering Committee includes: Provost (Chair), Professor/Librarian (Co-Chair), ten classroom faculty from all divisions, two academic administrators, AVP of Financial Affairs, two Learning Technologists, Manager Student Affairs, and Bookstore Manager
  - Average Textbook Cost at COD: New – Used; FA 2021: \$178.00 - \$133.00; SP 2022: \$206.00 - \$164.00; Student spending on course materials is declining, probably because students are choosing to pay for food, housing, and other essentials instead. Also other factors like different purchasing types, increase in the use of no-cost materials by faculty, etc.
  - Affordability approaches include: Open Educational Resources, Open Access Scholarship, library materials, and lower-cost commercial
  - The OER Steering Committee budget (\$150,000) for 2019-2022 includes: Faculty Non-Teaching Assignments (\$127,600), Conferences & Meetings (\$6,500), Dues & Memberships (\$6,900), and Other Contractual Services (\$9,000).
  - Student Savings & Students Affected 2019-2022: \$3 M and 11,045 students (an average of more than \$271 saved per student)
  - Grant Project Types Reassigned or Stipend: Original Writing, Remix/Reuse, As-is Adoption of OER, Resource List (Open Collection), Library-materials, Textbook Ancillaries
  - Faculty Grant Projects (118 participants): AY19-20 – 19 new projects, saving students an estimated \$981,000; AY20-21 – 17 new projects, saving students \$320,000; AY21-22 – 17 new projects, saving students \$580,174
  - Outreach and Training: Survey on attitudes about OER; Focus Groups on attitudes toward textbooks; Training program reached 400+ Faculty; 200 faculty, staff, and administrators sent to OpenEd conference; Outreach to individual faculty members
  - COD Open Publishing: Textbooks, Open Collections, Ancillaries
  - COD Digital Press: a repository of open educational resources created by COD faculty
  - Other Savings Options: Spring 2021 - 497 Faculty chose commercial course materials costing under \$50.00
  - Other ways to save: Older Editions, Rethinking Publishers, Library
  - Moving Forward: Sustainability of OER, Accessibility, Zero-Textbook Cost Programs, Zero-Textbook Cost Gen Ed Degree, Leveraging library materials, Partnerships with peer colleges, Grant Opportunities
 (Cote, 2022)

- **Affordability and Equitable Access in Course Materials at Cengage**
  - **Cengage Unlimited was described as the industry’s first affordable and scalable subscription that includes access to every Cengage online homework platform, all e-textbooks across disciplines and more. It’s access to everything in one place, for one price.**
    - Indicated that Cengage Unlimited has saved students over \$490 million across nearly 4 million unique users, in addition to saving students time and hassle when accessing course materials.
    - Indicated 30K students in Illinois used Cengage Unlimited last year, saving those students around \$10 M.
    - Suggest that the customizable resources available through Cengage Unlimited gives students access to the various resources they need to succeed while still focusing on outcomes, improving equity. Also indicated that Cengage Unlimited provide equity by design; through design standards and best practices: accessible for students with disabilities, agile development to remain current and relevant, and third-party links continuously validated and updated; through student experience: interactive, visual, and engaging (simulations, animations, videos), integrated assessments and grading, and personalized learning, including tutoring; and, through student and faculty support: student and faculty training with 24/7/365 tech support, and faculty have unlimited access to materials for course development.
    - Cengage Unlimited also provides a career center and study tools that offer real-time help.
    - Print is an optional add-on with Cengage Unlimited for \$9.99 rental (covers S&H) or \$25 loose-leaf purchase.
    - The Cengage Mobile App allows for reading online or off, highlighting, taking notes and listening, polling and attendance to encourage participation, study tools: flashcards and practice quizzes, reviewing of grades, activity updates and due date reminders, and access to college success and career center activities.  
(McAtee, 2022)

- 9. Examine the following areas in relation to improving equity in higher education to determine whether the (best practice) methods:**
- (A) improved equitable access to required course materials by the first day of class.**
  - (B) increased the affordability of required course materials; and**
  - (C) improved access to learning materials and improved student outcomes for minority, low-income, and first-generation students.**

Nearly all Illinois school respondents strongly agreed (72%) or agreed (25%) that students having their required course materials by the first day of class or soon after contributes to their academic success in the class. Furthermore, 87 percent strongly agreed (56%) or agreed (31%) that students having their required course materials by the first day of class or soon after increases retention, and 57 percent strongly agreed (19%) or agreed (38%) that the majority of students are struggling to afford their required course materials.



Eighty to 100 percent of respondents, regardless of how the majority of students at their institution obtain their course materials, strongly agreed or agreed that students having their required course materials by the first day of class or soon after contributes to their academic success in the class. However, schools with campus-wide textbook rental programs and equitable access programs were more likely to have strongly agreed than schools with self-procurement only and self-procurement and inclusive access programs, 80 percent and 83 percent, compared to 69 percent and 72 percent, respectively. All public university respondents, 97 percent of community college respondents, and 96 percent of private non-profit respondents strongly agreed or agreed that students having their required course materials by the first day of class or soon after contributes to their academic success in the class. The three proprietary school respondents did not provide feedback for this question.

Eighty to 100 percent of respondents, regardless of how the majority of students at their institution obtain their course materials, strongly agreed or agreed that students having their required course materials by the first day of class or soon after increases retention. Schools with campus-wide textbook rental programs and equitable access programs were more likely to have strongly agreed than schools with self-procurement only and self-procurement and inclusive access programs, 80 percent and 83 percent, compared to 51 percent and 50 percent, respectively. All public university respondents, 78 percent of community college respondents, and 83 percent of private non-profit respondents strongly agreed or agreed that students having their required course materials by the first day of class or soon after increases retention. The three proprietary school respondents did not provide feedback for this question.

Agreement that students are struggling to afford their required course materials varied by type of institution. Seventy-three percent of community college respondents, 50 percent each of private non-profit respondents and public university respondents, and 33 percent of proprietary school respondents strongly agreed or agreed that students are struggling to afford their required course materials. An additional 40 percent of public university respondents, 23 percent of community college respondents, 38 percent of private non-profit respondents, and 33 percent of

proprietary school respondents neither agreed nor disagreed that students are struggling to afford their required course materials.

Sixty-seven percent of all Illinois student survey respondents strongly agreed (37%) or agreed (30%) that having all required course materials by the first day of class (or shortly after) directly impacts how well they will do in the course, 21 percent neither agreed nor disagreed, and 12 percent disagreed or strongly disagreed that having materials by the first day of class (or shortly after) directly impacts how well they will do in a course.

The percentage of respondents who strongly agreed or agreed ranged from 82 percent of those who obtained materials through a campus-wide equitable access program, to 76 percent of those who obtained materials through a campus-wide textbook rental program, to 68 percent who obtained materials through self-procurement and inclusive access, to 63 percent who obtained materials through self-procurement only. There were no differences in the percentages who agreed or disagreed by college generation status. White and Black respondents were somewhat more likely to have strongly agreed or agreed that having course materials by the first day of class (or shortly after) directly impacts how well they will do in the course (70% and 72%, respectively) than Hispanic/Latino and Asian respondents (63% and 55%, respectively).

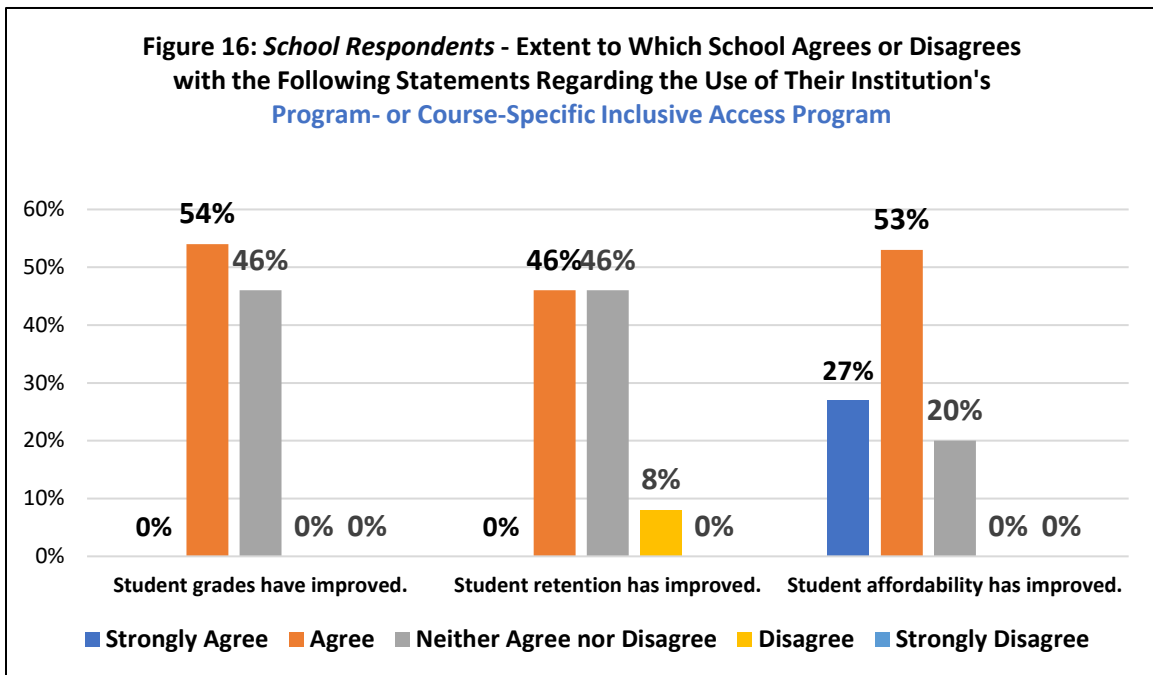
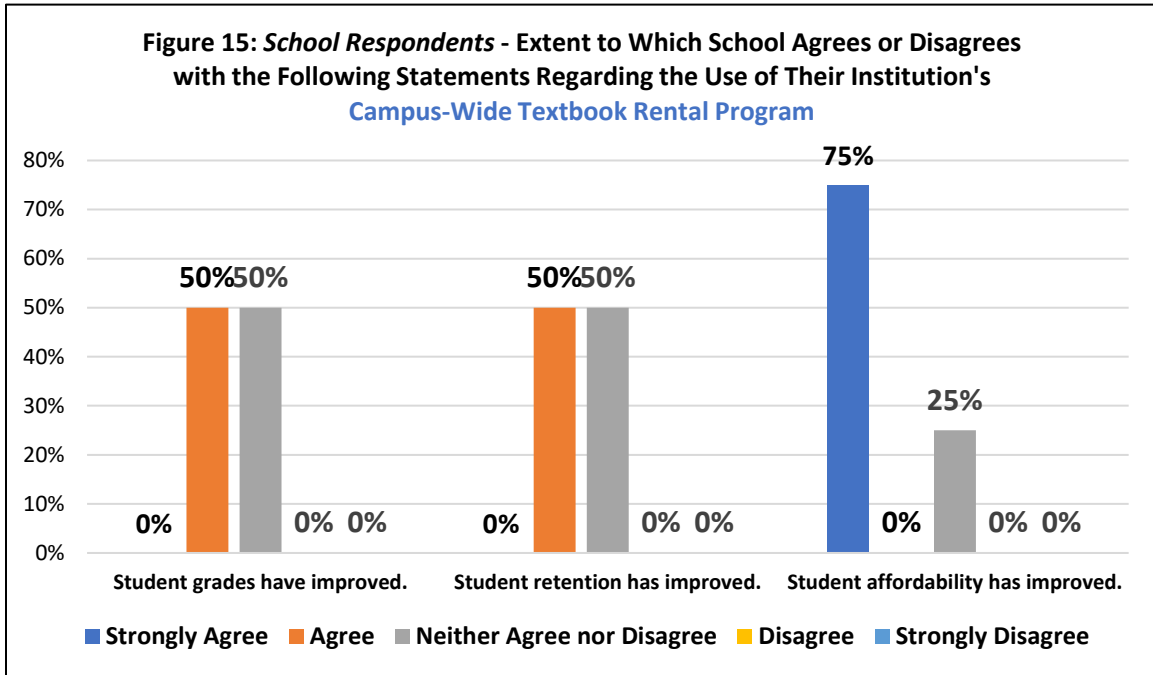
**Table 20: Student Respondents - Having All Required Course Materials by the First Day of Class (or Shortly After) Directly Impacts How Well Students Will Do in the Course**

	Strongly Agree	Agree	Neither Agree nor Disagree	Disagree	Strongly Disagree
<b>Overall</b>	<b>37%</b>	<b>30%</b>	<b>21%</b>	<b>9%</b>	<b>3%</b>
Self-Procurement Only	34%	29%	21%	11%	5%
Campus-Wide Textbook Rental Program	44%	32%	17%	5%	1%
Campus-Wide Equitable Access Program	51%	31%	15%	2%	1%
Self-Procurement and Inclusive Access Program	38%	30%	23%	7%	2%

Schools utilizing inclusive access, and schools with campus-wide textbook rental or equitable access programs were asked about various outcomes resulting from those programs. About 45 percent of overall respondents agreed that student grades have improved, student retention has improved, and student affordability has improved. About half of respondents neither agreed nor disagreed that student grades have improved or student retention has improved. In addition to 46 percent of respondents agreeing that student affordability has improved, 33 percent strongly agreed student affordability has improved (nearly 80% strongly agreed or agreed student affordability has improved). A school respondent indicating they neither agreed or disagreed could mean they have nothing to compare their current course material model to and/or that they have not looked at the impact of the model.

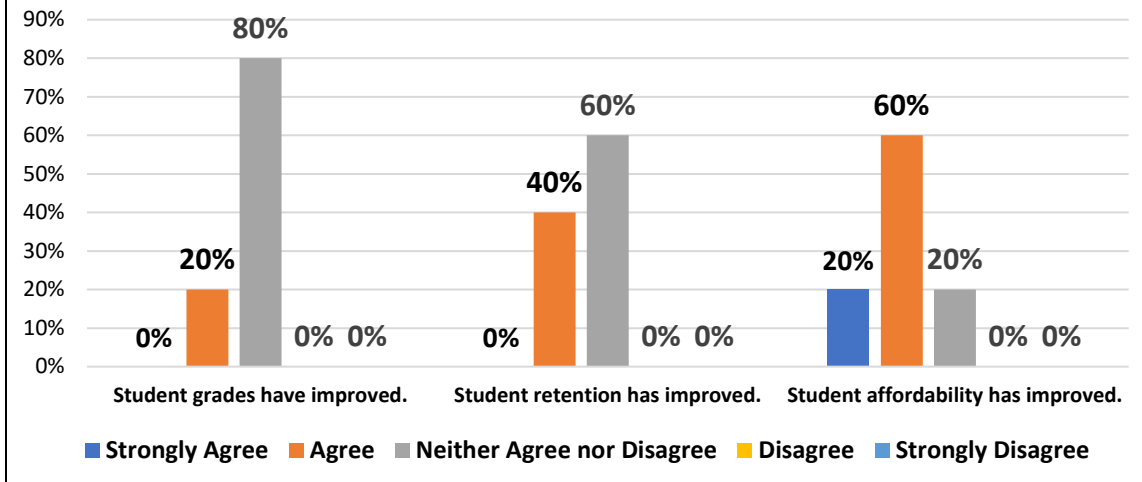
About half of textbook rental program and inclusive access school respondents agreed that student grades have improved. As most equitable access programs are a year or less old, only 20 percent of schools had enough data to believe students grades improved. The numbers of textbook rental program respondents (2) and equitable access program respondents (5) that provided feedback for this question were small. Forty to 50 percent of respondents, regardless of how the majority of students obtained course materials at their institution, agreed that student retention has improved. Seventy-five to 80 percent of respondents, regardless of how the majority

of students obtained course materials at their institution, strongly agreed or agreed that student affordability has improved, although the breakdown by strongly agreed and agreed varied. Seventy-five percent of campus-wide textbook rental program respondents (4 respondents) strongly agreed that student affordability has improved compared to 20 percent of equitable access program respondents (5 respondents), and 27 percent of respondents utilizing inclusive access.





**Figure 17: School Respondents - Extent to Which School Agrees or Disagrees with the Following Statements Regarding the Use of Their Institution's Campus-Wide Equitable Access Program**

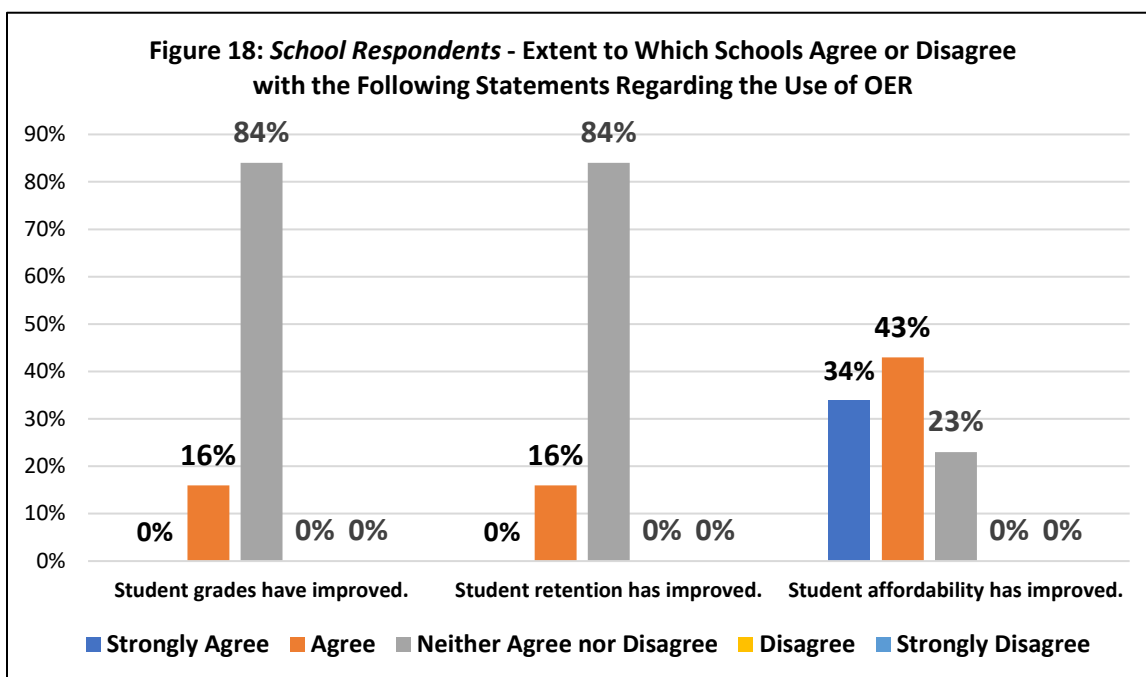


All public university respondents (1 school), 57 percent of private non-profit institution respondents, 44 percent of community college respondents, and no proprietary school respondents (1 school) agreed that student grades have improved as a result of the course material model they are using at their institution for the majority of their students; the remainder of all respondents neither agreed nor disagreed that grades have improved. All public university respondents (1 school), 29 percent of private non-profit institution respondents, 56 percent of community college respondents, and 50 percent of proprietary school respondents (1 school) agreed that student retention has improved; except for 1 private non-profit institution respondent that disagreed that student retention has improved, the remainder of all respondents neither agreed nor disagreed that student retention has improved. Sixty-seven percent of public university respondents (2 schools), 71 percent of private non-profit institution respondents, 91 percent of community college respondents, and all proprietary school respondents (2 schools) strongly agreed or agreed that student affordability has improved; the remainder of all respondents neither agreed nor disagreed that student affordability has improved.

Of those school respondents utilizing OER, 16 percent agreed that student grades and student retention have improved as a result of OER utilization, and 84 percent neither agreed nor disagreed that student grades and student retention have improved. Seventy-seven percent of respondents strongly agreed (34%) or agreed (43%) that student affordability has improved as a result of OER use. The remaining 23 percent of respondents neither agreed nor disagreed that student affordability has improved.

The majority of respondents, regardless of how the majority of students at their institution obtained their course materials, neither agreed nor disagreed that student grades and student retention have improved. Just one textbook rental program school and two equitable access program schools reported whether OER improved student affordability. Self-procurement and inclusive access program respondents were more likely than self-procurement only respondents to have strongly agreed or agreed that student affordability was improved through utilization of OER, 92 percent versus 72 percent. Substantial percentages indicating they neither agree or

disagree that various outcomes have been achieved via the various methods (campus-wide textbook rental or equitable access, program- or course-specific inclusive access, or OER) could indicate that institutions have not looked at those outcomes and/or have not had a change in their method of providing course materials (without which there are no “before and after” to compare).



No public university or proprietary school respondents (2 schools and 1 school, respectively), 8 percent of private non-profit institution respondents, and 25 percent of community college respondents agreed that student grades have improved as a result of using OER at their institution; the remainder of all respondents neither agreed nor disagreed that grades have improved. No public university or proprietary school respondents (2 schools and 1 school, respectively), 17 percent of private non-profit institution respondents, and 19 percent of community college respondents agreed that student retention has improved as a result of using OER at their institution; the remainder of all respondents neither agreed nor disagreed that retention has improved. Similarly, no public university or proprietary school respondents (2 schools and 1 school, respectively), 17 percent of private non-profit institution respondents, and 19 percent of community college respondents agreed that student affordability has improved as a result of using OER at their institution; the remainder of all respondents neither agreed nor disagreed that affordability has improved.

Research on the efficacy of various course material models' impact on affordability, student achievement, and completion is growing, but remains limited, particularly conducted by independent researchers and evaluators who are not vested into a particular approach. What is undisputed, is that student textbook costs and spending have significantly declined over the last decade thanks to significant and diverse efforts outlined in this report. Despite these significant gains in affordability, such savings have been overtaken by increases in other more significant costs of attendance. It's also clear that new models of delivery are also increasing students access to course materials in the beginning of classes countering the situation where a number of students are waiting or forgoing materials.

Controlling for inputs and determining causality for student completion and achievement outcomes is particularly a challenge in education research. Recently, leaders in the OER movement, have questioned much of the media comparison OER research that has been done to date suggesting OER is as good as commercial materials and pointed towards the desperate need for improving research studies going forward (Wiley, 2022; Grimaldi, 2019).

Much of the recent national research around student outcomes centers around the inclusive access and OER concepts/models, and much of the research indicates positive impacts. Studies support the adoption and implementation of OER textbooks that have resulted in cost savings by making high-quality educational resources freely available to students. Other studies have found that high-quality OER can lead to significant financial benefits for students and/or institutions, as well as reduce the potential of financial debt; that the affordability of OER can effectively support at-risk learners in their efforts to finish their studies; that a majority of faculty and students perceive OER to be equal to, or better than, commercial textbooks in terms of quality; that students preferred using OER instead of traditional textbooks, citing the benefits of cost, access, and attributes of online textbooks; and/or that faculty rated OER equal or superior to traditional resources in terms of current content, ease of use, efficacy, trusted quality, and cost (Colvard, 2018; Perez, 2021).

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**Much of the recent national research around student outcomes centers around the inclusive access, equitable access, and OER concepts/models, and much of the research indicates positive impacts, especially for at-risk populations.**

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Colvard looked to better understand how courses employing OER impact student success metrics. It was first found that students tend to perform better in course settings when OER textbooks were used in place of commercial textbooks, and drop-out, failure, and withdrawal (DFW) rates also decreased. DFW rates decreased dramatically for student populations that benefit the most from free textbooks - Pell eligible students, underserved populations, and part-time students. Additionally, the research revealed significant differences in academic performance (average final grade) for both White and non-White students enrolled in OER courses compared to previous semesters when OER were not yet adopted. The study also found a substantial increase in average course grade and a decrease in DFW rates for part-time students (Colvard, 2018).

The OER Degree Initiative was launched by Achieving the Dream (ATD) in 2016, with four grant partners and five funding organizations, to promote affordability and innovation at community colleges by supporting large scale OER adoption. Over two and a half years, the initiative supported 38 community colleges across 13 states in building degree pathways using only OER instructional materials (Griffiths, 2020).

SRI Education and RPK GROUP conducted a research and evaluation study of the OER Degree Initiative and shared the findings in 2020. It provided encouraging evidence regarding the academic outcomes of students who enrolled in multiple OER courses, the economic impacts for both students and institutions, and the experiences of key stakeholders. The initiative saved students at least \$10.7 million in instructional material costs (\$65 or more per student per OER course by eliminating the need to purchase commercial textbooks and other course materials). Evidence from 11 “research partner” colleges suggests that students who took multiple OER courses on average earned more college credits over time than otherwise similar students who took no OER courses, although this benefit did not vary significantly for underserved students versus other students. Students who took OER courses had similar cumulative GPAs as other

students, on average. Even though instructors engaged in the OER initiative primarily to reduce financial burden on students and to ensure they had access to course materials, most reported that OER at least somewhat changed the way they presented and used materials in class, increased the relevance of those materials, and influenced their pedagogical beliefs overall (Griffiths, 2020).

There are a number of studies on the impact inclusive access course material models have on student outcomes, and the majority of those studies found increases in success rates (earned a letter grade 'C' or better in course(s)) in total population or in population specific segments. Notably, for Black students, there were significant increases in success rates using inclusive access for course materials in all studies that found improvements, with increases in success rates (inclusive access versus self-procuring materials, and thus having course materials by the first day of class or soon after) ranging from +3.79 percent to +13.15 percent (Moore, 2022).

One study examined student outcome data over three academic years for a group of students at a public university in Texas for sections of a course using an inclusive access e-book compared to a group of students in sections of the same course that did not use an e-book. Students not using an e-book had a success rate (earned a letter grade 'C' or better) of 80.30 percent while students using an e-book had a success rate of 84.96 percent. The stronger performance among students using an e-book held true across the three race/ethnicity categories examined: Black (+3.79%), White (+3.35%), and Hispanic (+5.21%). Sex/gender categories of Male (+6.55%) and Female (+3.92%) also showed improvement (Moore, 2021).

Chattanooga State Community College examined the impact of the inclusive access program within their math department. The study found that the overall population had a 9.3 percent increase in success rates (letter grades A, B, and C). The study provided three race/ethnicity categories (Black +8.5%, White +8.9%, Other 6.5%) as well as sex/gender of Male (+9.5%) and Female (+8.9%), supported by financial aid (+4.79%), traditional students (+10.2%), and non-traditional students (+3.2%) showing increases in success rates (Moore, 2021).

Moore conducted analyses of three courses at a community college in the northeastern United States, examining the increase in the percentage of students who passed a class with a letter grade 'C' or better. The study did not find a statistically significant effect for any population with the exception of students enrolled in course BUSA 205 and, generally, for Black students. However, each demographic variable studied saw an increase in the percentage of students who passed a course with a letter grade 'C' or better when provided their required course materials as part of an inclusive access program compared to students who had the responsibility of sourcing their own required course materials. There was a decrease in the percentage of students who earned a grade of incomplete or withdrew. The total population of the study had a 3.88 percent increase in letter grade 'C' or better for students using an inclusive access model compared to students who had to source their own required course materials. This study provided four race/ethnicity categories (Black +13.15%, White +1.47%, Hispanic +1.22%, Other +1.59%), sex/gender of male (+2.31) and

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**The majority of five national studies on the impact inclusive access course materials models have on student outcomes found increases in success rates in total population or in population specific segments. Notable, was that for Black students, there were significant increases in success rates using inclusive access for course materials in all the studies that found improvements.**

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letter grade 'C' or better. The study did not find a statistically significant effect for any population with the exception of students enrolled in course BUSA 205 and, generally, for Black students. However, each demographic variable studied saw an increase in the percentage of students who passed a course with a letter grade 'C' or better when provided their required course materials as part of an inclusive access program compared to students who had the responsibility of sourcing their own required course materials. There was a decrease in the percentage of students who earned a grade of incomplete or withdrew. The total population of the study had a 3.88 percent increase in letter grade 'C' or better for students using an inclusive access model compared to students who had to source their own required course materials. This study provided four race/ethnicity categories (Black +13.15%, White +1.47%, Hispanic +1.22%, Other +1.59%), sex/gender of male (+2.31) and

letter grade 'C' or better for students using an inclusive access model compared to students who had to source their own required course materials. This study provided four race/ethnicity categories (Black +13.15%, White +1.47%, Hispanic +1.22%, Other +1.59%), sex/gender of male (+2.31) and

female (+3.24%), and traditional students (+2.67%) and non-traditional students (+5.86%) showing increases (Moore, 2021).

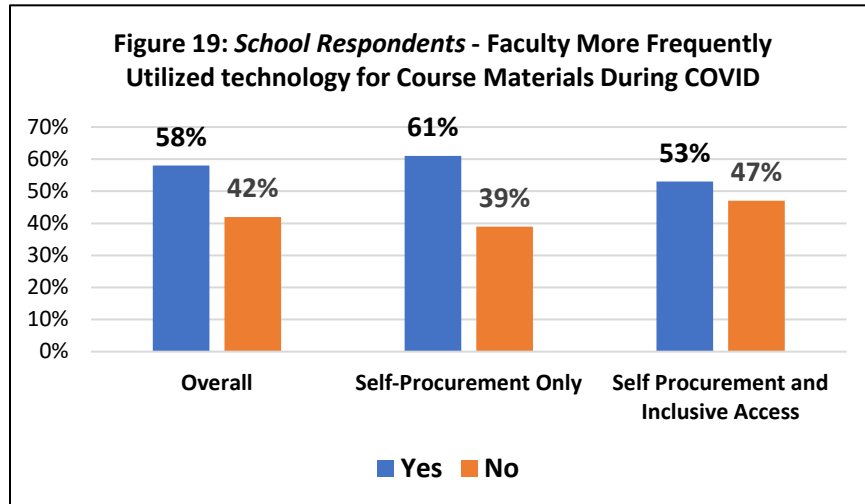
Moore (and Piazza) conducted another study to examine the use of an inclusive access course materials model on student outcomes at Waukesha County Technical College. The analysis documented significant differences, using chi-square analysis, between the before and after inclusive access samples obtaining a letter grade C or better for five of the nine categories examined – total population (+2.75), Female (+3.93), Black (+12.80), students  $\leq$  age 24 (+2.72), and students  $\geq$  age 25 (+3.40). When comparing the before/after inclusive access samples, there was a 5.23 percent increase in letter A grades and a decrease in letter grades B-F. Overall, there was a 2.05 percent decrease in withdrawals in the after inclusive access sample (Moore and Piazza, 2022).

Another study examined academic outcomes from an inclusive access pilot launched in the fall of 2019 by Tennessee’s largest system of public higher education. Results from across 13 community colleges, 41 course areas, and 141 courses indicated no significant differences in either overall or population-specific academic outcomes between the inclusive access pilot semester and the two prior falls in which the courses were taught. The findings demonstrate that benefits accrued from relative cost-savings and/or day one access were insufficient to produce significant improvements in academic outcomes, with no significant differences in outcomes also evidenced for non-White, federal Pell grant award recipients, and/or non-traditional students over the age of 25 (Spica, 2021).

Moore’s most recent research, *Equitable Access: A Participant v. Non-Participant Course Completion Rate Analysis*, examined the use of an equitable access course materials model and its impact on the course completion rates of participants and non-participants of the model at two, two-year institutions. The central research question asked: “When comparing participants and non-participants of an equitable access course materials model, is there a statistically significant relationship between participation status in an equitable access course materials model and course completion rate?”. Results of the study indicated statistical significance in all 11 demographic categories analyzed, including a 15.58 percent increase in the course completion rate in the total population and a 21.06 percent increase in the course completion rate for Black students when comparing participant and non-participant populations. Furthermore, all category demographics analyzed were statistically significant at  $p=.001$ . The results of this study suggest that participants in an equitable access course materials model are much more likely to complete a course than non-participants (Moore, *Equitable Access*, 2022).

#### **10. Describe the ways students and faculty are utilizing or have utilized inclusive access programs, subscription programs, textbook rental programs, used textbooks, and open educational resources for the purposes of remote learning as a result of the COVID-19 pandemic health crisis.**

Course materials utilizing technology and digital content were much more prevalent during the COVID-19 pandemic at Illinois schools, and a substantial percentage of both Illinois schools and students anticipate utilizing that format for course materials more in the future. More than half (58%) of self-procurement only and self-procurement and inclusive access school respondents (84% of all school respondents), and half or more of respondents by sector (except for proprietary schools with just one respondent to this question) reported that when most courses moved to remote learning at the peak of the COVID-19 pandemic, faculty at their institution, overall, more frequently required course materials that utilized technology or digital content.

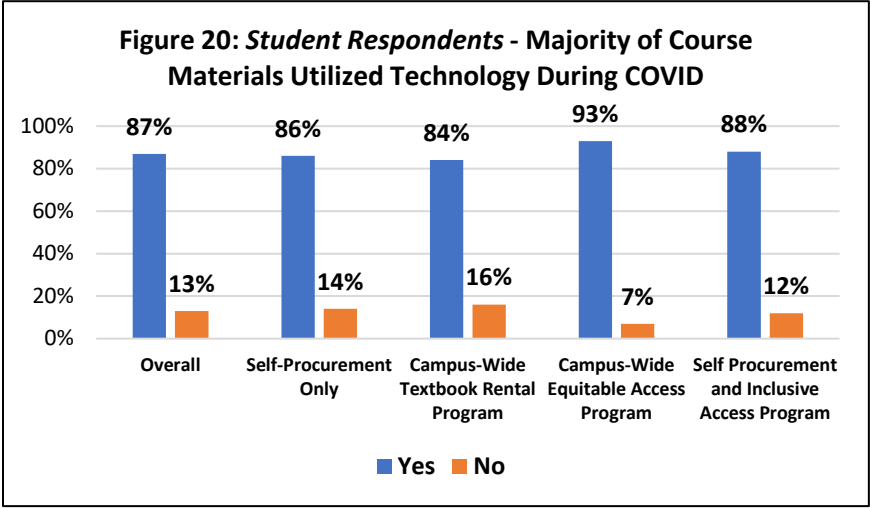


Of those respondents that reported faculty more frequently required course materials that utilized technology or digital content during the COVID pandemic, more than 80 percent indicated they anticipate all (6%), many (47%), or some (29%) of those material format changes to remain long term. Eighty percent or more of both self-procurement only and self-procurement (with inclusive access) schools reported they anticipate all, many, or some of the material format changes will remain long term. Private non-profit and community college respondents were more likely than public university respondents to have indicated they anticipate all, many, or some of those format changes will remain long term, 93 percent and 82 percent, compared to 67 percent, respectively.

**Table 21: School Respondents – Number of Course Material Changes Anticipate Remaining Long Term**

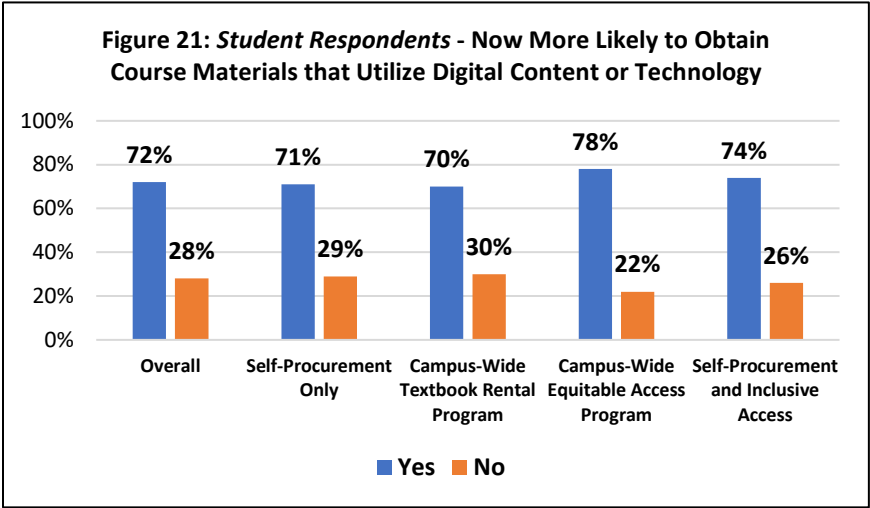
	Overall	Self-Procurement Only	Self-Procurement (with Inclusive Access)
All	6%	0%	20%
Many	47%	50%	40%
Some	29%	33%	20%
Few	6%	4%	10%
None	0%	0%	0%
Unsure	12%	13%	10%

Three-fourths of Illinois student respondents indicated they were in college at the peak of the COVID pandemic (academic year 2020-21) when most courses moved to remote learning. Eighty-seven percent of those respondents reported that the majority of their required course materials utilized technology or digital content during that time. As expected, the percentages who indicated that the majority of their required course materials utilized technology during that time were higher if they obtained those materials through a campus-wide equitable access program or a course-specific inclusive access program (93% and 88%, respectively), but the percentages indicating that were also high for those respondents who obtained their materials through self-procurement only or a campus-wide textbook rental program (86% and 84%, respectively).



Seventy-two percent, of the 87 percent of respondents who reported the majority of their materials utilized technology or digital content, indicated they are now more likely to obtain required course materials that utilize technology or digital content.

Respondents who obtained their materials through a campus-wide equitable access program or through self-procurement and inclusive access, were somewhat more likely (93% and 88%, respectively) than respondents who obtained materials through self-procurement only or a campus-wide textbook rental program (86% and 84%, respectively) to have indicated they are now more likely to obtain materials that utilize digital technology or digital content. First-generation college respondents (74%) indicated they are more likely than respondents who are not first-generation college respondents (70%) to now be more likely to obtain course materials that utilize digital content or technology. There was also variation by race/ethnicity; 83 percent of Asian respondents reported they are now more likely to obtain course materials that utilize digital content or technology, compared to 78 percent of Hispanic/Latino respondents, 74 percent of Black respondents, and 66 percent of White respondents.



A number of Illinois schools are considering providing course materials through a campus-wide textbook rental or equitable access program, course- or program-specific inclusive access program, and/or through OER in the future. These methods often provide course materials via a digital format. The COVID pandemic impacted school consideration of these methods to varying degrees.

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**Seventeen Illinois colleges or universities indicated they are considering offering a campus-wide textbook rental program in the future; 19% of those schools (5 schools) reported the COVID pandemic contributed to that consideration.**

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Thirty-one percent of school respondents not currently providing the majority of course materials through a campus-wide textbook rental program, or 17 schools, indicated they are considering offering one in the future. The percentage indicating they are considering offering a campus-wide textbook rental program differed by how schools are currently providing course materials for the majority of their students; no equitable access program schools, 29 percent of self-procurement only schools, and 41 percent of self-procurement and inclusive access schools. The 17 schools included 10 community colleges, 6 private non-profit schools, and 1 public university. Of the seventeen schools that indicated they are considering offering a campus-wide textbook rental program, 19 percent reported the COVID pandemic contributed to their consideration to offer the program in the future – 3 private non-profit schools, and 2 community colleges.

Fifty-five percent of self-procurement only and campus-wide textbook rental program schools (20 schools) reported they are considering offering a campus-wide equitable access program in the future. Textbook rental program schools were more likely than self-procurement only schools to have indicated they are considering offering a campus-wide equitable access program (60% versus 44%), although the 60% considering it represents just 3 schools. The 20 schools included 10 private non-profit schools (40% of those school respondents), 5 community colleges (50%), and 5 public universities (56%).

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**Twenty Illinois colleges or universities indicated they are considering offering a campus-wide equitable access program in the future, and 19 schools indicated they are considering offering a course-specific inclusive access program in the future; about one-third of those schools reported the COVID pandemic contributed to those considerations.**

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Forty-four percent of self-procurement only and campus-wide textbook rental program schools (19 schools) indicated they are considering offering a course-specific inclusive access program in the future. Textbook rental program schools were more likely than self-procurement only schools to have indicated they are considering offering a course-specific inclusive access program, although (again) the 60% considering it represents just 3 schools. The 19 schools included 9 private non-profit schools (36% of those school respondents), 6 community colleges (67%), and 4 public universities (44%). About one-third of both self-procurement only schools and campus-wide

textbook rental programs schools that indicated they are considering offering a campus-wide equitable access program or course-specific inclusive access program reported the COVID pandemic contributed to their consideration to offer the program in the future.



About one-third of both private non-profit and community college respondents, and one-quarter of public university respondents, indicated they are considering offering a campus-wide equitable access program or course-specific (1 public university) inclusive access program reported the COVID pandemic contributed to their consideration to offer the program in the future.

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**Twenty-three Illinois colleges or universities indicated the COVID pandemic caused them to consider offering OER courses or offering more OER courses in the future.**

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Thirty-eight percent of respondents indicated the COVID pandemic caused them to

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**Sixteen Illinois inclusive access schools indicated they are considering offering inclusive access for additional courses/materials in the future; 38% of those schools reported the COVID pandemic contributed to that consideration.**

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consider offering OER courses or offering more OER courses in the future. That percentage varied by how the majority of students obtain course materials at the institution, from 43 percent of self-procurement only respondents, to 38 percent of self-procurement and inclusive access program respondents, to 25 percent of campus-wide textbook rental program respondents, to 17 percent of campus-wide equitable access program respondents. The thirty-eight percent, or 23 schools, included 12 private non-profit schools (44% of those school respondents), 6 community

colleges (30%), and 5 public universities (50%).

Eighty-nine percent of inclusive access schools (16 schools) reported they are considering offering inclusive access for additional courses/materials in the future. Respondents considering offering inclusive access for additional courses/materials in the future included 10 community colleges, 4 private non-profit institutions, and 1 each public university and proprietary school. Thirty-eight percent of those 16 schools reported the COVID pandemic contributed to that consideration. The COVID pandemic contributed to that consideration for the one public university, 30 percent of the community colleges, half of the private non-profit institutions, and not for the one proprietary school.

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**Eleven Illinois self-procurement and inclusive access program schools indicated they are considering offering a campus-wide equitable access program in the future; one of those schools reported the COVID pandemic contributed to that consideration.**

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Sixty-five percent of self-procurement and inclusive access program schools (11 schools) reported they are considering offering an equitable access program in the future, including 7 community colleges, 3 private non-profit institutions, and 1 public university. Nine percent of those 11 schools (1 private non-profit institution) reported the COVID pandemic contributed to that consideration.

National student survey data also indicates the COVID pandemic impacted the college course materials experience. Many more students took online courses, more utilized bookstores' online presence, fewer students rented, more paid for digital materials, and more downloaded materials for free. More students rented materials from publishers, and relatedly, more students and schools utilized inclusive access.

The NACS *Student Watch* 2020-21 report includes data points on the college course materials experience for students and reflects impacts from the COVID-19 pandemic. In a typical year, only about 18 percent of students take one but not all online-only courses, while 17 percent are exclusively enrolled in online-only courses. During the 2020-21 academic year, 81 percent of respondents had taken classes that were fully online at some point during the year. More than one-third of students said they would be more likely to take online courses in the future, while 24 percent would be less likely.

Although purchasing (78%) remained the primary way students acquired materials, and renting (35%) the second most common form of acquisition, fewer respondents rented materials in 2021 while more paid for digital materials and downloaded materials for free. The format of course materials acquired is another area that saw a sizable shakeup in 2021. Typically, used print is the most common unit acquired, followed by new print materials, with digital trailing quite a bit further behind. In 2021, all three unit types were within a few percentage points of one another: new print – 32 percent, used print – 31 percent, and digital – 29 percent. Forty-five percent of students reported obtaining at least one digital course material in academic year 2020-21.

Format preference saw little change; 48 percent of students surveyed in both 2021 and in 2020 preferred some type of print materials (whether it is traditional standalone print or print with additional digital components), 23 percent of students preferred some type of digital materials (whether it's a standalone e-book or a digital book with additional digital content), up slightly from 21 percent in spring 2020, and a large proportion of students, 28 percent, continued to say preference “depends on the course”.

In past years, campus stores' physical locations have been the number one place students turn to in order to purchase and rent their materials. In 2020-21, the campus store was still the number one place students turned to, but purchases and rentals from campus stores' online presence saw increases with corresponding decreases at physical locations. A little more than 1 in 4 students (28%) either purchased or rented directly from a publisher. Renting from publishers was an area that saw a particular increase this year, doubling from only 9 percent in 2020 to 18 percent in 2021. This increase is likely tied to the increase in inclusive access seen this year, with half of those who rented from a publisher also reporting using inclusive access.

Students used more free materials in spring 2021 than they have since Student Watch began measuring this area. Students acquired 1.04 free materials in the spring semester compared to 0.73 units acquired on average in spring 2020. One out of three students (33%) participated in an inclusive access program for at least one class during 2021. This was up from 26 percent in 2020 and 15 percent in 2019. The increase is believed to be primarily due to the pandemic, and presumably the need to quickly pivot to remote learning and delivery of course materials.

The number of faculty who had participated in an inclusive access program more than doubled from 21 percent in 2020 to 54 percent in 2021. Many of the faculty (46%) who have used the program said they were new to it, another sign of how quickly this approach to course materials is growing. Usage of inclusive access varies based on subject matter discipline. Faculty teaching hybrid/hyflex courses this past fall term were twice as likely to have used inclusive access as their peers teaching in person. Faculty awareness of inclusive access increased significantly in 2021. Just one year prior, 41 percent of faculty had not heard of such a program. In 2021, the number of faculty who had never heard of inclusive access had dropped to 23 percent (Student Watch, 2021; Faculty Watch, 2022).

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\* Five (of the 23) Task Force members indicated they believe there are inaccuracies in the matrix/table provided in slide six of the MHEC Task Force presentation. This same matrix is also included in MHEC's report - *Toward Convergence, Creating Clarity to Drive More Consistency in Understanding the Benefits and Costs of OER*. Both of those sources are referenced above. Several of those Task Force members indicated they have vocalized their concerns to MHEC.

## Appendices

### Appendix A: Illinois Public Act 102-0122

#### College Course Materials Affordability and Equitable Access Collaborative Study Act

AN ACT concerning education.

WHEREAS, Postsecondary education is increasingly necessary for success in the modern workforce; and

WHEREAS, The affordability of college is an ongoing concern for students, families, and State policymakers; and

WHEREAS, The equitable first-day-of-class access to effective textbooks and other learning materials plays a critical role in a student's postsecondary educational experience; and

WHEREAS, Institutions of higher learning within and outside of this State are utilizing online educational software to enhance and personalize a student's learning experience while driving down the costs of attending college; therefore,

#### **Be it enacted by the People of the State of Illinois, represented in the General Assembly:**

Section 1. Short title. This Act may be cited as the College Course Materials Affordability and Equitable Access Collaborative Study Act.

Section 5. College Course Materials Affordability and Equitable Access Task Force; membership.

(a) The College Course Materials Affordability and Equitable Access Task Force is created within the Illinois Student Assistance Commission.

(b) The Task Force shall consist of all of the following members:

(1) One member of the General Assembly appointed by the President of the Senate.

(2) One member of the General Assembly appointed by the Minority Leader of the Senate.

(3) One member of the General Assembly appointed by the Speaker of the House of Representatives.

(4) One member of the General Assembly appointed by the Minority Leader of the House of Representatives.

(5) One member of the public appointed by the President of the Senate.

(6) One member of the public appointed by the Minority Leader of the Senate.

(7) One member of the public appointed by the Speaker of the House of Representatives.

(8) One member of the public appointed by the Minority Leader of the House of Representatives.

(9) One member representing an institution of higher learning appointed by the President of the Senate.

(10) One member representing an institution of higher learning appointed by the Minority Leader of the Senate.

(11) One member representing an institution of higher learning appointed by the Speaker of the House of Representatives.

(12) One member representing an institution of higher learning appointed by the Minority Leader of the House of Representatives.

(13) The following members appointed by the Governor:

- (A) One member representing the Board of Higher Education.
  - (B) One member representing the Illinois Community College Board.
  - (C) One member representing the Illinois Student Assistance Commission.
  - (D) One member representing the Faculty Advisory Council of the Board of Higher Education.
  - (E) One member representing the Student Advisory Council of the Board of Higher Education.
  - (F) One member who is a librarian or online education specialist.
  - (G) One member representing a national association representing the higher education textbook publishing industry.
  - (H) One member representing a statewide professional organization that advocates on behalf of public university employees.
  - (I) One member representing a statewide professional organization that advocates on behalf of public community college employees.
  - (J) One member representing a national association representing higher education book stores in this State.
  - (K) One member representing a higher education digital content platform provider with offices located within this State.
- (b) Appointments to the Task Force shall be made within 90 days after the effective date of this Act.
- (c) The Task Force shall meet initially at the call of the Illinois Student Assistance Commission, shall elect a chairperson from among the appointed members at the Task Force's initial meeting, and shall thereafter meet at the call of the chairperson.
- (d) The chairperson and other members of the Task Force shall serve without compensation but shall be reimbursed for their reasonable and necessary expenses from funds appropriated to the Illinois Student Assistance Commission for that purpose, including travel, subject to the rules of the appropriate travel control board.

#### Section 10. Illinois Student Assistance Commission assistance.

- (a) The Illinois Student Assistance Commission shall provide administrative support, staff support, and other resources necessary for the College Course Materials Affordability and Equitable Access Task Force to fulfill the Task Force's obligations under this Act.
- (b) The Illinois Student Assistance Commission shall designate a staff member to serve as a point of contact between the Task Force and the public and to serve as a technology and policy advisor to assist the Task Force. The Commission shall provide a public website or web page for the Task Force to publish digital meeting notices, minutes, commentary, draft reports, reports, and other relevant documents and information online.

#### Section 15. Meetings.

- (a) Meetings of the College Course Materials Affordability and Equitable Access Task Force are subject to the Open Meetings Act. The Task Force shall make available to the public online meeting notices at least 10 days in advance of any Task Force meeting and shall publish meeting minutes that are available to the public within 14 days after the meeting to allow for structured written and verbal commentary by the public throughout the process.
- (b) The Task Force shall establish and maintain a contact list of all members of the public who seek to be apprised of the work of the Task Force to allow for electronic notification, by email or by any other mutually agreed-upon method, of Task Force meetings, agendas, minutes, draft reports, reports, and other communications regarding the work of the Task Force.
- (c) The Task Force may conduct its work remotely via telephone and online video broadcasting, including through audio and video conferencing applications. The Task Force

shall allow for public observation and structured participation via telephone and online video broadcasting for all meetings conducted by the Task Force.

#### Section 20. Duties.

(a) The duties of the College Course Materials Affordability and Equitable Access Task Force are to:

(1) conduct a collaborative college course materials affordability and equitable access study;

(2) examine the cost-saving methods and practices utilized by public and private institutions of higher learning in this State and throughout the United States for improving students' equitable first-day-of-class access to required course materials and conduct an affordability comparison of providing students' course materials, including digital learning tools; and

(3) submit a report of its findings to the Governor, the General Assembly, and the Illinois Student Assistance Commission.

(b) The report required to be submitted under subsection (a) shall include all of the following items:

(1) A list of cost-saving methods available to students, including, but not limited to:

(A) inclusive access programs;

(B) textbook subscription programs;

(C) textbook rental programs;

(D) used textbooks; and

(E) other institutional textbook cost-saving methods, such as open educational resources.

(2) The total amount of cost savings achieved by public and private institutions of higher learning and the total number of students that utilize each cost-saving method.

(3) The equitable access achieved for students by providing all students with access to course materials on the first day of class.

(4) The potential impact on academic freedom of faculty to be able to choose the most appropriate materials for their courses for each of the various methods of providing course materials.

(5) A description of the process required to implement each cost-saving method listed in paragraph (1) of this subsection (b).

(6) A description of the process by which students obtain required course materials.

(7) The current, future, and potential costs of the development and maintenance necessary for the utilization of any course material that is provided to students at no charge.

(8) The identification of best practices resulting from the cost-saving methods listed in paragraph (1) of this subsection (b).

(9) An examination of the following areas in relation to improving equity in higher education to determine whether the methods:

(A) improved equitable access to required course materials by the first day of class;

(B) increased the affordability of required course materials; and

(C) improved access to learning materials and improved student outcomes for minority, low-income, and first-generation students.

(10) A description of the ways students and faculty are utilizing or have utilized inclusive access programs, subscription programs, textbook rental programs, used textbooks, and open educational resources for the purposes of remote learning as a result of the COVID-19 pandemic health crisis.

Section 25. Collaboration. As part of the College Course Materials Affordability and Equitable Access Task Force's information gathering process to prepare its report under Section 20, the

Task Force shall engage and consult with higher education administrators, faculty, campus bookstores, publishers, librarians, and other online education specialists for their perspectives on the topics covered by this Act. The Task Force may also seek advice and input from such other persons and entities as the Task Force finds helpful to its work as outlined in this Act.

Section 30. Reporting; dissolution.

(a) No later than October 1, 2022, the Task Force shall submit an initial collaborative report of its findings to the Governor, the General Assembly, and the Illinois Student Assistance Commission. The Illinois Student Assistance Commission shall publish the initial collaborative report of the Task Force's findings on the Commission's website. Members of the public and other interested parties shall have until February 1, 2023 to submit written comments with regard to the initial collaborative report. The Commission shall publish comments submitted by members of the public or other interested parties on its website.

(b) No later than March 31, 2023, the Task Force shall submit a final collaborative report of its findings to the Governor, the General Assembly, and the Illinois Student Assistance Commission. The Illinois Student Assistance Commission shall publish the final collaborative report of the Task Force's findings on the Commission's website.

(c) The Task Force is dissolved on March 31, 2024.

Section 90. Repeal. This Act is repealed on March 31, 2025.

Section 99. Effective date. This Act takes effect upon becoming law.

Effective Date: 7/23/2021

## Appendix B: Task Force Members and Bios

### CCM Task Force Members

Appointing Authority	Description/Category	Name	Affiliation/Organization
Governor -Chairman	Illinois Student Assistance Commission (ISAC) Representative	<b>Eric Zarnikow, Executive Director, ISAC</b>	ISAC
Senate President	General Assembly Member	<b>Sen. Laura Murphy (SD28)</b>	Senate Democratic Caucus
Senate Minority Leader	General Assembly Member	<b>Sen. Sally Turner (SD44)</b>	Senate Republican Caucus
House Speaker	General Assembly Member	<b>Rep. Edgar Gonzalez (HD21)</b>	House Democratic Caucus
House Minority Leader	General Assembly Member	<b>Rep. Dan Swanson (HD74)</b>	House Republican Caucus
Senate President	Member of the public	<b>Lily Rocha</b>	Young Invincibles
Senate Minority Leader	Member of the public	<b>Lindsay Anderson</b>	Cengage
House Speaker	Member of the public	<b>Tom Loftus</b>	Assistant State's Attorney
House Minority Leader	Member of the public	<b>Alli Gentile</b>	Pearson
Senate President	Institution of Higher Learning	<b>Jennifer Becker</b>	McGraw Hill
Senate Minority Leader	Institution of Higher Learning	<b>Jeff Stowell</b>	EIU
House Speaker	Institution of Higher Learning	<b>Joan Knox</b>	Federation of Independent Illinois Colleges and Universities (FIICU)
House Minority Leader	Institution of Higher Learning	<b>Cynthia Boyce</b>	Lincoln Trail (Illinois Eastern Community Colleges)
Governor	Illinois Board of Higher Education (IBHE) Representative	<b>Amy Spies</b>	IBHE
Governor	Illinois Community College Board (ICCB) Representative	<b>Melvin Harrison</b>	ICCB
Governor	IBHE-FAC	<b>Shawn Schumacher, Chair; DeVry Senior Professor English and Humanities</b>	IBHE-FAC
Governor	IBHE-SAC	<b>Pending</b>	
Governor	Librarian or online education specialist	<b>Anne Craig, Director</b>	Consortium of Academic and Research Libraries of Illinois (CARLI), based at UIUC
Governor	National association representing higher education publishing industry	<b>Kelly Denson, Vice President of Education Policy and Programs</b>	Association of American Publishers
Governor	Statewide professional organization that advocates for public university employees	<b>Jill Dupy</b>	Illinois Federation of Teachers (IFT) recommendation
Governor	Statewide professional organization that advocates for public community college employees	<b>Dr. Denise Cote (professor and librarian)</b>	College of DuPage
Governor	National association representing higher education bookstores in this state	<b>Rich Hershman, Vice President of Government Relations</b>	National Association of College Stores
Governor	Higher education digital content platform provider with offices located within this state	<b>Tom Scotty</b>	RedShelf



## CCM Task Force Bios Provided

**Eric Zarnikow:** Eric is the Executive Director of the Illinois Student Assistance Commission (ISAC), a state agency providing information and assistance to help make education beyond high school accessible and affordable for Illinois families. ISAC provides comprehensive, objective, and timely information on education and financial aid for students and their families — giving them access to the tools they need to make the educational choices that are right for them. Then, through the state scholarship and grant programs ISAC administers, including the state's flagship Monetary Award Program, ISAC can help students make those choices a reality.

Eric is a former Associate Administrator at the U.S. Small Business Administration, where he led the Office of Capital Access, responsible for all the agency's programs and operations concerning financial assistance to small businesses, 800 employees and a \$90 billion loan and investment portfolio. Prior to his work with the SBA, Eric spent over 25 years in the private sector, including serving as Senior Vice President, Chief Risk Officer and Treasurer at ServiceMaster. Eric serves on several commissions and is currently a trustee of The College Board, serving on its Executive, Investment and Finance Committees and as chair of its Audit Committee. A certified public accountant, Eric received his bachelor's degree from Iowa State University and MBA from Drake University.

**Senator Laura Murphy:** Park Ridge native; B.S. in Political Science from Illinois State University; former Des Plaines alderman; currently lives in Des Plaines with her husband and son.

Committee assignments: Executive Appointments (Chair); Commerce; Environment and Conservation; Executive; Financial Institutions; Higher Education; Labor; Local Government (Vice-Chair); App-Constitutional Offices (Sub-Chair); Appropriations; Redistricting; Redistricting-Northwest Cook; Executive- Elections (Sub-Chair); Executive- Government Operations (Sub-Vice-Chair).

**Senator Sally Turner:** Senator Sally Turner is a graduate of the University of Illinois. She has a Master's degree in Organizational Leadership from Lincoln Christian University. Senator Turner is a former juvenile probation officer, former Logan County State's Attorney Paralegal and served as Logan County Clerk and Recorder from 1994-2018. She is married and has 2 adult children. She has been a State Senator since 2021.

**Lily Rocha:** Lily Rocha is the Midwest Regional Director for Young Invincibles Midwest. YI is a national, nonprofit organization committed to elevating the voices of young adults in the political process and expanding economic opportunity for 18-34 year-olds. The Midwest office has been in operation since 2013 and focuses on workforce development, health care, and higher education issues and projects with young Illinoisans.

Lily joins YI with over a decade's worth of work in state and federal policy dedicated to serving marginalized communities. As an aide in U.S. Senator Dick Durbin's D.C. office, she worked on education policy, ensuring college graduates who were drowning in debt had a voice in Congress. As a Legislative Assistant in the U.S. House of Representatives, Lily assembled a coalition of grassroots supporters and industry stakeholders to draft a new bill tackling mental health stigmas and requiring culturally competent care. After Congress, she joined the New York City office of the Joyful Heart Foundation, an anti-sexual assault organization, where she led collaborative efforts with sexual assault survivors and state legislators to enact laws enhancing survivors' rights and eliminating the backlog of thousands of untested rape kits

across the country. Prior to joining YI, Lily was the Chief of Staff to Illinois State Representative Barbara Hernandez.

Lily received her B.A. in Economics-Political Science from Columbia University. She is a proud native and current resident of Aurora, IL.

**Lindsay Anderson:** Lindsay is Co-Founder and Partner of Turing Strategies, a government relations firm that helps clients navigate — and advocate — at Chicago City Hall and the Illinois State Capitol.

Lindsay has a wide variety of government experience in both legislative and executive roles. Most recently, she served as the Executive Director of the Office of Governmental Relations for the University of Illinois System, where she coordinated and managed governmental relations activities and strategies across three universities and a healthcare enterprise at the local, state, and federal levels.

Lindsay served as Chair of the State Universities Retirement System of Illinois and the Illinois Board of Higher Education from 2013-2016. At SURS, she oversaw a cost-sharing, multiple employer public employee retirement system serving over 57,000 beneficiaries and 163,000 active and deferred employees of Illinois Higher Education and Community College system that provides annuities to more than 200,000 members, faculty and nonacademic employees of state universities and colleges, community colleges, scientific surveys, and other related agencies. At IBHE, she was responsible for planning and coordinating Illinois systems of higher education.

Lindsay was also appointed by the Governor to Chair the Campaign Finance Reform Task Force, a statewide task force created by statute to conduct a thorough review of and make recommendations to the Governor and General Assembly regarding implementation of campaign finance reform legislation in Illinois from 2010-2015.

Lindsay began her legal career at the City of Chicago where she worked in the law department and the Mayor's office. She also served as assistant counsel in the Illinois General Assembly where she served as parliamentarian of the Revenue and Local Government Committees. She later served as a Governor's Legislative Director and Senior Advisor. In-between her government service, Lindsay worked as Counsel at McGuireWoods, a worldwide, full-service legal and public affairs firm.

Lindsay was recently named a 2021 Leadership Greater Chicago Fellow and selected to participate among the top leaders from the business, government, and civic communities in the Chicago-land region. She also participated in Governor Edgars Fellowship Program in 2015.

Lindsay lives with her husband and three daughters in Wilmette, where she serves as a Wilmette Park District Board Commissioner and President of Wilmette School District 39 Community Review Committee.

Lindsay is a proud native of Champaign, Illinois, a graduate of the University of Illinois at Urbana-Champaign and IIT Chicago-Kent College of Law.

**Alli Gentile:** Alli Gentile has been with Pearson since 2000 and is currently Regional VP of Sales for Pearson Higher Ed. Her experience in Higher Education content and services includes

marketing, product management, business development, sales, and sales leadership. She lives in Columbus, Ohio with her husband, son, and Goldendoodle.

**Jennifer Becker:** Jennifer Becker leads strategic partnerships focused on student success for the education technology company, McGraw Hill, based in Chicago, IL. She currently oversees a team of professionals focused nationally on partnering with federal and state policymakers, higher-education agencies, and college administrators to develop and implement innovative strategies to improve college readiness, course material access and affordability, student retention and completion. With over 20 years of leadership experience in sales, marketing, business development strategy, and government affairs in public and private higher education sectors, Jennifer shares passion, enthusiasm, and vision for maintaining academic integrity and increasing educational equity in higher education. Jennifer grew up in Marion, IL, and graduated with a Bachelor of Science in Merchandising and a Minor in Marketing from Southern Illinois University.

**Jeff Stowell:** Dr. Jeffrey Stowell earned his BS and MS in Psychology from Brigham Young University and his PhD in Psychobiology from The Ohio State University. He is a professor and the assistant chair of the Psychology Department at Eastern Illinois University (EIU) where he teaches courses in biological psychology, sensation & perception, and learning.

**Cynthia Boyce:** Cynthia Boyce, 49, is an Assistant Professor of History at Lincoln Trail College in Robinson, Illinois. Boyce received a Bachelor of Arts degree in History from the University of Illinois, Urbana-Champaign and a Master of Arts degree in History with a specialization in Labor History from Indiana State University. She has sixteen years of teaching experience in higher education. Boyce received two Innovative Technology Grants from Illinois Eastern Community Colleges that were used to transition her classroom into a student-centered, collaborative learning environment. Since 2017, Professor Boyce has served on the Faculty Advisory Council to IBHE where she has contributed to several working groups including Dual-Credit, Mental Health, Equity and Inclusion, and more recently, Student Debt and Affordability. In 2020, Boyce was chosen to serve as Chair of the Community College Caucus of the FAC. In addition to teaching at LTC, she serves as Student Senate Advisor, chair of the Diversity, Equity, and Inclusion Committee, Discipline Chair of Assessment for Social Sciences, member of the IECC Faculty Advisory Committee, member of the Enrollment Management Committee currently working with Ruffalo Noel Levitz, member of the college president's Inclusion, Diversity, Equity, Awareness and Strategy Committee, and member of the Distance Delivery Education Committee. In 2021, she received LTC's Excellence in Online Education Award and Excellence in Teaching Award. She is active with the United Way in her local community and both organized and oversees the LTCares Food Pantry on her college campus.

**Shawn Schumacher:** I am a Senior Professor of English and Humanities at DeVry University, where I have been teaching full-time since 1990. I earned a Ph.D. in Educational Leadership from Colorado State University in 2005, an M.A. in English Literature from Governors State University in 1994, and a B.A. in English with Teacher Certification from Eastern Illinois University in 1990.

Additionally, I am currently in my second year as Chair of the Faculty Advisory Council to the Illinois Board of Higher Education, advocating for the 51,000+ higher education faculty teaching in the state of Illinois. I have served on the FAC for fourteen years, serving as Vice Chair for five years and as Chair of the Private and Independent Colleges and Universities Caucus for five years.

I also co-authored the program proposal for DeVry University's M.S.Ed. program, which includes concentrations in Curriculum Leadership, Educational Leadership, and Educational Technology Leadership. I have served as a Subject Matter Expert for several courses within the M.S.Ed. program and have authored the DeVry University Graduate Thesis and Project Handbook for the program.

In addition to my teaching duties at DeVry University, I have also taught as an adjunct instructor in the graduate program at the American College of Education and have taught English and Humanities at the undergraduate level at Aurora University, Elmhurst University, the University of St. Francis, Robert Morris University, and Waubensee Community College.

In my spare time, I serve on the Board of Education for Yorkville School District #115 and as a Varsity Football Coach at Yorkville High School. I enjoy traveling, reading, skiing, playing tennis and golf, coaching youth football and baseball, rooting for Chicago sports teams, and spending time with my family and friends. I live in Yorkville, Illinois with my wife, Tara, and our four children—Matt (23), Will (19), Kate (12), and Michael (9).

**Anne Craig:** Since July of 2016, Anne Craig has had the privilege of serving as the Senior Director at CARLI, the Consortium of Academic and Research Libraries in Illinois, a unit of the University of Illinois System. CARLI includes 127 academic and research libraries as its members, ranging in size and scope from the University of Illinois at Urbana-Champaign to small, one-person libraries, and research libraries like the Newberry. In September 2021, CARLI was awarded the three-year Open Textbooks Pilot Grant from the US Department of Education for \$1.08 million for the project, "Illinois SCOERs: Support for the Creation of Open Educational Resources." Anne has started several consortia-wide projects, including the Institute of Museum and Library Services grant, "CARLI Counts: Analytics and Advocacy for Service Development," strategic planning, and a philanthropy program. Prior to July 2016, Anne was the Director of the Illinois State Library for 11 years under Secretary of State Jesse White. She held various roles at the ISL since starting there as a Reference Librarian in 1989.

**Kelly Denson:** Kelly L. Denson is Vice President of Education Policy and Programs for the Association of American Publishers. In this role, Kelly advises AAP members on state and federal education initiatives that impact the American publishing industry, advocating for clear policies that reflect and advance the important contributions of education publishers. These include digital materials personalized to the individual learning needs of the student and high-quality content accessible to, and affordable for every student.

Kelly also serves as a key advisor to the academic community, leading joint publisher-academia events and other public outreach that promotes the critical partnership between the publishing and education communities.

With more than 25 years in the education industry, Kelly's prior roles include the Director of Education Policy and Government Affairs at Discovery Communications and Senior Policy Analyst for the Educational Testing Service (ETS). Kelly has also held positions at various institutions of higher and K-12 education, including Boston University, SUNY Empire State College in New York, and The Dalton School in New York City where she taught science. Kelly holds a Bachelor of Arts in The Biological Basis of Behavior from the University of Pennsylvania and a Master's in Education from Harvard University.

**Richard Hershman:** Rich Hershman is Vice President of Government Relations for the National Association of College Stores, Oberlin, OH, and has been with NACS since November 2003. He

has focused his efforts on higher education and retail policies at the federal and state level with a particular focus on course material affordability. He has participated in a number of state and federal advisory committees studying the issue and has worked with other stakeholders, including students and higher education associations in advocating for sound policies and legislation across the country to help students with course materials and other higher education costs. Working with StudentPirgs, Rich helped develop textbook rental pilot legislation included in the Higher Education Act and funded by Congress at \$20 million. He also helped expand federal higher education tax credits to include course materials as eligible expenses

Prior to NACS, Rich worked for nine years on K-16 education policy for the Knowledge Alliance, supporting education R&D and education technology policy and funding including chairing the Education and Libraries Network Coalition promoting the e-rate connectivity program.

Rich graduated with a degree in Politics and Government from Ohio Wesleyan University in 1993.

**Tom Scotty:** Tom Scotty is a strategic, results-driven operating and sales executive with extensive experience successfully building and leading a large, mature corporation and a fast-paced growth stage start-up organization in the highly competitive educational technology marketplace. Tom is currently a Strategic Advisor and formerly Chief Operating Officer at RedShelf, an educational technology company helping to improve education through the use of affordable and easy-to-access digital course materials. RedShelf distributes nearly a million digital titles from 400+ publishers and offers an end-to-end Content Delivery System (CDS) to help thousands of institutions more efficiently manage their digital course materials delivery process. Tom joined RedShelf in 2014 and has been instrumental to the company's success as the most-utilized Inclusive Access platform among independent and leased campus bookstores and one of the nation's fastest-growing companies.

Prior to RedShelf, Tom spent seventeen successful years at Macmillan Learning serving in a variety of sales positions, including President of Sales and Operations and Co-President of this "Big 5" academic publishing company. In the position of Co-President, Tom was responsible for driving revenue and profitable growth in North America while accelerating Macmillan's transformation from a print educational publishing business to a premier provider of digital content, tools, and services for instructors and students. While at Macmillan, Tom also served on the Board of Directors of CourseSmart, a market-leading digital content services company.

Before embarking on his career in educational publishing and digital course materials, Tom was the Head Diving Coach at the University of California, Los Angeles and the University of California, San Diego where he led his athletes and teams to numerous championships and earned several "Coach of the Year" honors. Tom lives in Chicago's western suburbs with his wife Carol, and they have three young adult children, Alexandra, Seamus, and Finn.

## **Appendix C: Task Force Meeting Agendas and Minutes**

### **Agenda – March 28, 2022 (Meeting 1)**

#### **Meeting of the College Course Materials Affordability and Equitable Access Task Force Virtual Event**

March 28, 2022

1 p.m.

1. Announcements
2. Appointment of Task Force Chair (Action: Task Force)  
Action Taken: Approved, Eric Zarnikow, unanimously by roll call vote
3. Approval of Tentative 2022 Meeting Dates (Action: Task Force)  
Action Taken: Approved
4. Introductions and Brief Overview of ISAC (Information)
5. Overview of Act and Task Force Charge (Information)
  - A. Introduction of ISAC Staff Member Liaison
  - B. ISAC Web Address for Task Force
  - C. Public Mailing List
  - D. Review of Content of the Initial and Final Reports
  - E. Expectation of Collaboration
  - F. Report and Dissolution
6. Proposal for Meeting the Task Force Charge (Information)
  - A. Discuss Survey Instruments
7. High-Level Overview of Some Relevant Data (Information)
  - A. Most Recent Illinois College Course Material Studies
  - B. College Course Material Purchasing Options
  - C. Available Data on College Course Material Costs
8. Discussion of Other Items to Cover/Consider, Including Suggestions for Individual/Organization Presentations for the Task Force
9. Public Comment
10. Next Steps

**Meeting Minutes – March 28, 2022**

**MINUTES OF THE  
ILLINOIS STUDENT ASSISTANCE COMMISSION  
COLLEGE COURSE MATERIALS AFFORDABILITY AND EQUITABLE ACCESS  
TASK FORCE  
VIDEO CONFERENCE  
Instruction to be provided by ISAC.org**

**March 28, 2022  
1:00 p.m.**

**MEMBERS PRESENT via WebEx:**

Senator Laura Murphy, Senate Democratic Caucus  
Senator Sally Turner, Senate Republican Caucus  
Representative Edgar Gonzales, House Democratic Caucus  
Representative Dan Swanson, House Republican Caucus  
Lily Rocha, Young Invincibles  
Lindsay Anderson, Cengage  
Tom Loftus, Assistant State's Attorney  
Alli Gentile, Pearson  
Jeff Stowell, EIU  
Joan Knox, FIICU  
Cynthia Boyce, Lincoln Trail (Ill Eastern Community Colleges)  
Melvin Harrison, ICCB (staff)  
Eric Zarnikow, ISAC, Executive Director  
Anne Craig, CARLI, based at UIUC  
Shawn Schumacher, IBHE-FAC chair,  
Kelly Denson, Association of American Publishers  
Denise Cote, College of DuPage  
Richard Hershman, National Association of College Stores  
Tom Scotty, RedShelf  
Jennifer Becker

**STAFF PRESENT via WebEx:**

Eric Zarnikow, Executive Director  
Shana Rogers, Managing Director, RPPA  
Katharine Gricevich, Director, Government Relations  
Susan Giberson, Senior Research Associate, RPPA  
Rich Nowell, General Counsel  
Gloria Legette, Deputy General Counsel  
Natalie Wandall, Administrative Assistant to the Task Force  
Scott Taylor, Assistant Director, RPPA

Kevin Bertolino, Research Associate, RPPA  
Manuel Talavera, Professional Development Specialist  
Dada Ibrahimovic, Professional Development Specialist  
Lisa Murphy-Coveny, Senior Compliance Counsel

**OTHERS PRESENT via WebEx:**

Pat Schuberg  
Amy Spies  
Paul Ramey  
Call in User\_5  
Call in User\_6

The meeting of the College Course Materials Affordability and Equitable Access Task Force was called to order at 1:11 p.m.

Mr. Zarnikow, ISAC's Executive Director, introduced himself and provided background information regarding ISAC and the programs it administers to help make education beyond high school accessible and affordable.

He explained that the meeting was being conducted through electronic means pursuant to the College Course Materials Affordability and Equitable Access Act (which he would refer to as "the Act) and the Open Meetings Act which allow the work of the task force to be completed remotely through audio and video conferencing applications.

He further stated that, as with all ISAC public meetings, a specific time was reserved in the agenda for public comment.

He explained that the applicable law requires a roll call for every vote and gave Commission members the relevant instructions.

He indicated that there would be a verbatim recording of the whole meeting, open and closed sessions, as required by law.

He advised meetings could not be scheduled closely enough to allow for approved minutes to be made available to the public within 14 days after a meeting as required by the Act. However, he explained that in order to comply with the spirit of the Act and ensure that the public has the opportunity to engage throughout the process, a recording of the meeting would be posted to ISAC's website within 48 hours of the meeting.

WebEx instructions, including those for public comment, and closed session were provided by Manuel Talavera.

Mr. Zarnikow called for a roll call of the Task Force. A roll call was taken, and a quorum was established.



### **Item 1. Announcements- Welcome Statement**

Mr. Zarnikow introduced Natalie Wandall, the Task Force Administrative Assistant. In addition, he reviewed the applicable statutory obligations of the members including Ethics training, Open Meetings Act training, and Ethics time sheet submissions. After noting that the responsibility to comply with the requirements is the responsibility of each member, he explained that Ms. Wandall is available to provide assistance. He reminded the members that Open Meetings Act requirements apply anytime a majority of a quorum of members, in this case seven, discuss task force business. Therefore, in person meetings, phone calls or email exchanges among more than six members discussing task force business could be deemed to be a meeting and requested that members refrain from such action to avoid inadvertently violating the Open Meetings Act.

### **Item 2. Appointment of a Chair (Action)**

Mr. Zarnikow explained that the first action for the members is to appoint a chair of the Task Force and advised that he has offered to serve in that capacity.

Member Knox **MOVED THAT** Eric Zarnikow be appointed Chair of the Task Force. Member Craig seconded the motion.

Mr. Zarnikow opened the floor for discussion and additional motions. Hearing none, a roll call vote was taken and the motion was unanimously approved by all voting members.

### **Item 3. Approval of the Tentative 2022 Meeting Dates (Action)**

Mr. Zarnikow presented a power point slide listing the tentative meeting dates of May 12, 2022, July 21, 2022, and August 25, 2022. He reminded the members that special meetings could be called with 10 days advance notice. He suggested the August 25, 2022, meeting as a target date for the Task Force to approve the initial report in order to make any recommended changes prior to the October 1, 2022, deadline for submission.

Member Cote **MOVED** to approve the calendar year 2022 activity calendar as provided on the slide shared with the members. Member Schumacher seconded the motion. A roll call vote was taken, and the motion was unanimously approved by all voting members.

### **Item 4. Introduction of ISAC staff members and Task Force Members (Information)**

Mr. Zarnikow advised that, pursuant to the Act, Shana Rogers has been designated to serve as a point of contact for the Task Force and the public as well as policy and technology advisor to assist the Task Force. ISAC staff members who will also provide support to the efforts of the Task Force introduced themselves.

Ms. Rogers presented a slide outlining the requirements in the Act for appointments of the Task Force members. Members each briefly introduced themselves and discussed their interest in serving on the Task Force.

#### **Item 5. Overview of Act and Task Force Charge (Information)**

Ms. Giberson provided an overview of the Act and advised that ISAC's role is to provide support to the Task Force, maintain the public contact list, and publish Task Force information on its website. She further explained the duties of the Task Force, the topics to be examined and included in the report, and the articulated goal of seeking collaboration from outside entities.

#### **Item 6. Proposal for Meeting the Task Force Charge (Information)**

Ms. Rogers provided a draft proposal for actions designed to meet the obligations of the Task Force, including the development of research questions, conducting secondary research, reviewing legislation and discussions with subject matter experts. In addition, she explained that the student survey is currently in the field and the draft school survey was sent recently sent to Task Force members for feedback and welcomed any suggestions regarding additional possibilities for gathering data.

There was discussion regarding the surveys, the challenges, and methods for identifying and increasing responses from individuals with the most subject matter knowledge. Ms. Rogers acknowledged the expertise of the members and invited them to email her with any additional suggestions or feedback.

Ms. Rogers suggested that presentations on some topics, such as textbook rental programs, inclusive or equitable access programs, and open resources would be helpful to understand the benefits and impacts, associated costs, and the process for studying the programs to answer the study questions.

There were numerous suggestions from the members regarding possible presentation topics such as the basic terminology, availability of options, first day access, options inside and outside of Illinois, options at 2- and 4-year institutions, cross-campus collaboration, and differing perspectives on inclusive access. Ms. Rogers expressed appreciation for the discussion and explained that the ISAC team will follow up and may reach out for more information to set up presentations.

Ms. Rogers identified a possible timeline and framework for completing the study and report.

#### **Item 7: High-Level overview of some relevant Data (Information)**

Ms. Rogers indicated that the study will also include the review of secondary materials and a scan of applicable legislation. She presented slides of information regarding studies, articles and reports on relevant topics. She indicated that there are links on the CCM Task

Force page to many of the items presented in the slides. She highlighted several laws, studies and articles presented in the slides.

Ms. Rogers also presented information from the GAO report that identifies the 4 categories of decisions that student must make when obtaining course material. There was discussion regarding the need to include discussion regarding affordability and impact on students who are unable to purchase the materials. Ms. Rogers continued to review relevant findings from relevant reports and indicated that the slides with the information would be provided to members.

In the interest of ending the meeting by the scheduled time, Mr. Zarnikow suggested completing the remaining business before finishing the remainder of the presentation.

### **Item 9: Public Comment**

No requests for public comment were made.

Member Kelly Denson, who due to technical difficulties was unable to be heard previously, introduced herself.

### **Item 8: Discussion of Other Items to Cover/Consider, Including Suggestions for Individual/Organization Presentations for the Task Force**

Ms. Rogers addressed the issue of affordability and noted studies that show the impact on student who are unable to obtain course materials, the reasons some students do not obtain the material, and the perceived value of the materials. She noted the need to review those topics.

### **Item 10. Next Steps**

Mr. Zarnikow thanked the members for serving on the Task Force. Ms. Rogers answered questions regarding the time frame for receiving responses to the surveys and logistical presentation information.

Seeing no further business to come before the Task Force, Member Knox **MOVED** to adjourn. Member Schumacher seconded that motion, which was unanimously approved by the Task Force.

The meeting adjourned at approximately 3:01 p.m.

Respectfully submitted,

Lisa Murphy-Coveny

**Agenda – May 12, 2022 (Meeting 2)**  
**Meeting of the College Course Materials Affordability and Equitable Access Task Force**  
Virtual Event

May 12, 2022

1 p.m.

1. Introduction of select ISAC staff and new Task Force members (Information)
2. Presentations (Information)
  - A. University of Illinois Urbana-Champaign
  - B. Scholarly Publishing and Academic Resources Coalition (SPARC)
  - C. Consortium of Academic and Research Libraries in Illinois (CARLI)
  - D. RedShelf
  - E. Illinois Open Educational Resources (OER) Stakeholders Group
  - F. Association of American Publishers (AAP), McGraw Hill, Pearson, and Norton
3. Approval of Minutes from First Meeting (Task Force Action)
4. Reminders (Information)
5. Review of Plan for Meeting Task Force Charge and Updates (Information)
6. Review of Preliminary Student Survey Results (Information)
7. Public Comment
8. Next Steps

**Meeting Minutes – May 12, 2022**

**MINUTES OF THE  
ILLINOIS STUDENT ASSISTANCE COMMISSION  
COLLEGE COURSE MATERIALS AFFORDABILITY AND EQUITABLE ACCESS  
TASK FORCE  
VIDEO CONFERENCE  
Instruction to be provided by ISAC.org**

**May 12, 2022  
1:00 p.m.**

**MEMBERS PRESENT via WebEx:**

Eric Zarnikow, ISAC Executive Director and Task Force Chair  
Senator Laura Murphy, Senate Democratic Caucus  
Senator Sally Turner, Senate Republican Caucus  
Representative Edgar Gonzales, House Democratic Caucus  
Lily Rocha, Young Invincibles  
Lindsay Anderson, Cengage  
Tom Loftus, Assistant State's Attorney  
Alli Gentile, Pearson  
Joan Knox, FIICU  
Cynthia Boyce, Lincoln Trail (Il Eastern Community Colleges)  
Melvin Harrison, ICCB (staff)  
Anne Craig, CARLI, based at UIUC  
Shawn Schumacher, IBHE-FAC chair  
Kelly Denson, Association of American Publishers  
Denise Cote, College of DuPage  
Richard Hershman, National Association of College Stores  
Tom Scotty, RedShelf  
Jennifer Becker, McGraw Hill  
Jill Dupy, Southern Illinois University  
Amy Spies, Illinois Open Educational Resources Stakeholders Group

**STAFF PRESENT via WebEx:**

Eric Zarnikow, Executive Director  
Shana Rogers, Managing Director, RPPA  
Katharine Gricevich, Director, Government Relations  
Susan Giberson, Senior Research Associate, RPPA  
Rich Nowell, General Counsel  
Gloria Legette, Deputy General Counsel  
Natalie Wandall, Administrative Assistant to the Task Force  
Scott Taylor, Assistant Director, RPPA  
Kevin Bertolino, Research Associate, RPPA

Ana Moya, Professional Development Specialist  
Dada Ibrahimovic, Professional Development Specialist  
Lisa Murphy-Coveny, Deputy General Counsel

**OTHERS PRESENT via WebEx:**

Chris Sweet  
Yorick Lopez  
Nicole Allen  
Sara Benson  
Laura Knox  
Katie Sheen  
Nicole Swanson  
Hannah Keller  
Paul Ramey  
Jeff Newell  
Dan

The meeting of the College Course Materials Affordability and Equitable Access Task Force was called to order at 1:05 p.m.

Mr. Zarnikow, the Chair of the task force and ISAC's Executive Director, welcomed attendees and noted for new members that the slide deck and the verbatim recording of the first task force meeting were posted to isac.org. He also advised that the current meeting was being recorded and would be posted to the website within 24 hours.

He explained that, as with all public meetings, a specific time was reserved in the agenda for public comment. He reviewed the basic meeting procedures.

WebEx instructions were provided by Dada Ibrahimovic.

Chair Zarnikow called for a roll call of the Task Force. A roll call was taken, and a quorum was established.

**Item 1. Introduction of Select ISAC Staff and new Task Force Members (Information)**

For the benefit of new members, Chair Zarnikow introduced ISAC staff members and explained their roles with respect to the task force. Member Dupy introduced herself and described her interest in the college course materials subject area.

**Item 2. Presentations from Members (Information)**

Ms. Rogers advised that six presentations were scheduled for the meeting. She explained the procedures that would be followed for the presentations and Q&A sessions to provide all members equal time to share, discuss and comment on each presentation. In addition,

she explained that in the event time did not permit, questions could be emailed to the task force mailbox and the responses would be compiled and provided to all members prior to the next meeting.

### **Item 2A. University of Illinois Urbana-Champaign**

Sara Benson spoke about the result of the University's course materials task force and the actions taken by the University with respect to promoting and funding Open Educational Resources. There was discussion regarding the calculation of savings to students, the budget and time frames for creating the OER materials.

### **Item 2B. Scholarly Publishing and Academic Resources Coalition (SPARC)**

Katie Sheen and Nicole Allen reported that the goals of Scholarly Publishing and Academic Resource Coalition are to make education open and equitable. They explained some of the differences between the various material options and emphasized the importance of providing choices for students and obtaining student input when determining affordability. There was discussion regarding some of the stated differences between material options and the impact of OER on debt and data security in the long term.

Ms. Rogers assured members that the goal is to provide the opportunity for presentations on a range of options and opinions. She explained that if this particular meeting appeared to contain more information about OER, it was simply a matter of scheduling which would balance out in subsequent meetings.

### **Item 2C. Consortium of Academic and Research Libraries in Illinois (CARLI)**

Anne Craig from the Consortium of Academic and Research Libraries in Illinois reported on the Illinois Support for Creation of Open Educational Resources (SCOERs) pilot grant project and the role of librarians in supporting OER. There was discussion regarding the focus of the SCOERs grant, how CARLI works with campus bookstore and the challenges of digital access costs for students.

### **Item 2D. RedShelf**

Tom Scotty, from RedShelf, provided an overview of inclusive access including the history of the transition from print to digital and benefits to students, faculty and institutions. He provided illustration of the technology and the student experience with inclusive access. There was discussion regarding who the content creators are, the options if a student opts out, and the cost of any OER included in inclusive access.

### **Item 2E. Illinois Open Educational Resources (OER) Stakeholders Group**

Amy Spies, Jeff Newell, and Denise Cote from the Illinois Open Educational Resources Stakeholders Group presented the activities of the group to educate and promote the use

of OER including the Community College Summit, higher education surveys, the action team that focuses on developing interagency action plan for statewide OER, the Senior Leader Seminar and the use of the Perkins CTE funds for OER. There was discussion regarding the results of the survey and the need for a consistent statewide approach to calculate student savings.

#### **Item 2F. McGraw Hill, Pearson and Norton**

Jennifer Becker (McGraw Hill), Alli Gentile (Pearson), Laura Knox (Norton) and Kelli Denson (Association of American Publishers) presented the changes in publishing that led to better access, lower costs and improved learning outcomes for students that resulted from the shift to digital platforms and the development of inclusive access. They noted their focus on delivering high quality materials in affordable ways, providing instructor support, and the benefits of inclusive access. There was discussion about the market rate, the estimated savings and the results of a student survey regarding inclusive access. There was discussion regarding the methods for determining the purchase decisions of students who opt out of the inclusive access.

#### **Item 3. Approval of the Minutes from the March 28, 2022, meeting (Action)**

Chair Zarnikow stated that the minutes were previously distributed by email to each member for their review. He therefore dispensed with the reading of the minutes.

Chair Zarnikow asked members if there were any requested changes to the minutes. Hearing none, the minutes were approved as distributed.

#### **Item 4. Reminders (Information)**

Chair Zarnikow reminded the members of their obligation to complete assigned training and submit ethics time sheets. He also reminded members that if more than 6 members meet to discuss task force business either in person, electronically, through email, or by phone, it could be considered a meeting in violation of the Open Meetings Act.

#### **Item 7. Public Comment (Information)**

There were no requests for public comment.

#### **Item 5. Review of Plan for Meeting Task Force Charge and Updates (Information)**

Ms. Rogers updated the members on the progress made on the plan for completing the task force charge and presented the information contained in the slide deck. She advised that surveys have been sent to student and schools. She advised that the results are due at the end of May, but that she expected to work with schools to obtain results through June.

#### **Item 6. Review of Preliminary Student Survey Results**



Ms. Rogers reported the preliminary findings from the student survey responses. She explained that the survey was sent to MAP recipients with the annual survey. She advised that the MAP recipient population is representative of the population the task force seeks to assist. She explained the current response rate and an overview of the information sought in the survey. She reviewed the responses received by the students in the survey.

**Item 8. Next Steps**

Chair Zarnikow thanked the members for their attendance and participation at the second meeting of the Task Force. He advised that the next meeting was scheduled to take place on Thursday, July 21, 2022. In addition, he reminded the members that any questions could be held until the next meeting or sent to the task force email box.

Seeing no further business to come before the Task Force, Member Spies **MOVED** to adjourn. Member Loftus seconded that motion, which was unanimously approved by the task force.

The meeting adjourned at approximately 4:00 p.m.

Respectfully submitted,

Lisa Murphy-Coveny

**Agenda – July 21, 2022 (Meeting 3)**  
**Meeting of the College Course Materials Affordability and Equitable Access Task Force**  
Virtual Event

July 21, 2022

1 p.m.

1. Greeting and Introductions if any New Members (Information)
2. Review and Update on Task Force Charge (Information)
3. Presentations (Information)
  - A. Eastern Illinois University
  - B. University of New Hampshire - Dr. Michael Moore, Research Scientist
  - C. Waubensee Community College
  - D. College of DuPage
  - E. Midwestern Higher Education Compact (MHEC)
  - F. OHIOLink
  - G. Campus Bookstore Panel
4. Approval of Minutes from Second Meeting (Task Force Action)
5. Reminders (Information)
6. Public Comment
7. Next Steps

**Meeting Minutes – July 21, 2022**

**MINUTES OF THE  
ILLINOIS STUDENT ASSISTANCE COMMISSION  
COLLEGE COURSE MATERIALS AFFORDABILITY AND EQUITBLE  
ACCESS TASK FORCE  
VIDEO CONFERENCE  
Instruction to be provided by ISAC.org**

**July 21, 2022  
1:00 p.m.**

**MEMBERS PRESENT via WebEx:**

Eric Zarnikow, ISAC Executive Director and Task Force  
Chair Senator Laura Murphy, Senate Democratic Caucus  
Senator Sally Turner, Senate Republican  
Caucus Lily Rocha, Young Invincibles  
Lindsay Anderson, Cengage  
Tom Loftus, Assistant State’s Attorney  
Alli Gentile, Pearson  
Jeff Stowell, EIU  
Joan Knox, FIICU  
Cynthia Boyce, Lincoln Trail (Il Eastern Community Colleges)  
Melvin Harrison, ICCB (staff)  
Anne Craig, CARLI, based at UIUC  
Shawn Schumacher, IBHE-FAC chair  
Kelly Denson, Association of American Publishers  
Richard Hershman, National Association of College Stores  
Tom Scotty, RedShelf  
Jennifer Becker, McGraw Hill  
Jill Dupy, Southern Illinois University  
Amy Spies, Illinois Open Educational Resources Stakeholders Group

**MEMBERS ABSENT:**

Representative Dan Swanson, House Republican Caucus  
Representative Edgar Gonzales, House Democratic Caucus  
Denise Cote, College of DuPage

**STAFF PRESENT via WebEx:**

Eric Zarnikow, Executive Director  
Shana Rogers, Managing Director, RPPA  
Katharine Gricevich, Director, Government Relations

Susan Giberson, Senior Research Associate, RPPA  
Rich Nowell, Interim General Counsel  
Natalie Wandall, Administrative Assistant to the Task Force  
Scott Taylor, Assistant Director, RPPA  
Kevin Bertolino, Research Associate, RPPA  
Thomas Semanic, Capacity Development & Training  
Manuel Talavera, Professional Development Specialist  
Dada Ibrahimovic, Professional Development Specialist  
Lisa Murphy-Coveny, Deputy General Counsel

**OTHERS PRESENT via WebEx:**

Rashawn Overton  
Katie Zaback  
Hannah Keller  
Paul Ramey  
Richard Kolasa  
Jenny Parks  
Pat Schuberg  
Elizabeth Groves  
Grace McGinnis  
Anna Bendo  
Dave Gliva  
Mike Moore  
Elyse Weller  
Meridith DePaepe  
Jessica Moreno  
Katie Steen  
L Garcia

The meeting of the College Course Materials Affordability and Equitable Access Task Force was called to order at 1:10 p.m.

Mr. Zarnikow, the Chair of the task force and ISAC's Executive Director, welcomed attendees and noted for new members that the slide deck and the verbatim recording of the previous task force meeting were posted to [isac.org](http://isac.org). He also advised that the current meeting was being recorded and would be posted to the website within 24 hours.

He explained that, as with all public meetings, a specific time was reserved in the agenda for public comment. He reviewed the basic meeting procedures.

WebEx instructions were provided by Dada Ibrahimovic.

Chair Zarnikow called for a roll call of the task force. A roll call was taken, and a quorum was established.

### **Item 1. Introduction of Select ISAC Staff and new Task Force Members (Information)**

Chair Zarnikow explained that staff members were introduced at previous meetings and therefore there was no need for repeated introductions. He advised that a student member had not yet been officially appointed and acknowledged the importance of having the student perspective represented on the panel. He noted that the course materials questions on the student survey resulted in responses from approximately 8,800 students.

### **Item 2. Review of Plan for Meeting Task Force Charge and Updates (Information)**

Ms. Rogers updated the members on the progress made on the plan for completing the task force charge and presented the information contained in the slide deck. She advised that surveys have been sent to student and schools and expressed appreciation for the assistance of the task force members to encourage survey responses. She provided an overview of the responses received to date.

### **Item 3. Presentations from Members (Information)**

Ms. Rogers advised that seven presentations were scheduled for the meeting. She explained the procedures that would be followed for the presentations and Q&A sessions to provide all members equal time to share, discuss and comment on each presentation. In addition, she explained that in the event time did not permit, questions could be emailed to the task force mailbox and the responses would be compiled and provided to all members prior to the next meeting.

#### **Item 3A. Eastern Illinois University**

Jeff Stowell spoke about the textbook rental service program at Eastern Illinois University and reviewed the program's estimated costs and savings to students. He also reviewed the eBook OER pilot program and the results of a student preference survey of eBook vs. printed material. There was discussion about the costs to develop it into a campus wide program. There was further discussion regarding faculty preference, learning outcomes and opt out options.

#### **Item 3B. University of New Hampshire**

Michael Moore, research scientist from the University of New Hampshire, spoke about his own quantitative studies on inclusive access. He specifically addressed different program cost vs. effectiveness and the impact on student outcomes. He explained focus beyond cost to students' ability to complete school. He addressed the differences between course success and completion rates between students who obtained their own course materials, and those who obtained their materials via inclusive access (who all had materials by the first day of class). He reviewed the

research impact on higher education including first semester GPA, and transferability. There was discussion of the study regarding impacts of first day access, opt out, and considering outcomes in addition to cost savings.

### **Item 3C. Waubonsee Community College**

Jessica Moreno, Dean for Academic Support from Waubonsee Community College identified the textbook affordability strategies currently provided by the institution. She explained the evaluation plan for the college's inclusive access program to consider the effectiveness, cost savings, the experience of faculty and students, and the impact on academic success and momentum. David Gliva presented information regarding publisher participation, the results of the evaluation of student savings, participation rates, and survey results. He explained the goal to add physical items such as lab manuals to inclusive access. There was discussion about the method of calculating cost savings, OER options and the percentage of students taking at least one class with the inclusive access program.

### **Item 3D. College of DuPage**

The presenter was unable to attend, and the presentation was postponed.

### **Item 3E. Midwestern Higher education Compact (MHEC)**

Katie Zaback and Jenny Parks gave an overview of MHEC including their research, projects and policy regarding the best practices bringing consistency to cost savings analysis for OER. Ms. Zaback presented a report which discussed the need for common language, principles to measure cost savings, and the developed formulas for cost saving and cost benefit analyses. She highlighted the need to understand the emerging consistent principles and framework and presented survey results that people are measuring costs savings as well as additional measure such as outcomes, DFW rates, student satisfaction, course completion, enrollment rates and faculty engagement. There was discussion regarding measuring outcomes, and whether the framework can be applied to other types of course materials to fairly assess student savings.

The presentations were paused to note that Member Knox joined the meeting. The student task force member, Isaiah Overton, provided a brief introduction. Chair Zarnikow noted that while the appointment was not yet complete, he hoped it would be soon.

### **Item 3F. OHIOLink**

Anna Bendo, spoke about the member Ohio statewide library consortium, OhioLINK. She reviewed a 2016 survey of which resulted in a plan to provide support for library led affordability initiatives, Higher education grants for OER and reduce costs of textbook costs. She reviewed the initiatives for OER, Inclusive Access and library

resources and discussed importance of consistent approaches to data to compare and the need for additional funding to continue the work. There was discussion regarding the feedback from students or faculty who preferred print materials over online. There was also discussion regarding the value of using all programs if one has a greater cost savings than the others. Finally, there was discussion regarding student access if a combination model is used

### **Item 3G. Campus Bookstore Panel**

Rich Hershman presented data from the newest (yet published) NACS's *Student Watch* report on the spending required for course materials. He identified the mission of college bookstores, the types of bookstores and the textbook adoption process. He identified bookstore's role as a facilitator for faculty options, considerations, timeline, and cost savings analysis when choosing materials. Finally, he identified the benefit to students to have greater information and a variety of lower cost options. There was discussion regarding the ability of bookstores to provide first day access by allowing students to purchase course materials that the bursar would bill the student for later.

### **Item 4. Approval of the Minutes from the May 12, 2022 meeting (Action)**

Chair Zarnikow stated that the minutes were previously distributed by email to each member for their review. He therefore dispensed with the reading of the minutes.

Chair Zarnikow asked members if there were any corrections to the minutes. Hearing none, the minutes were approved as distributed.

### **Item 5. Reminders (Information)**

Chair Zarnikow reminded the members of their obligation to complete assigned training and submit ethics time sheets. He advised members to reach out to Ms. Wandall for assistance and thanked those who have complied.

### **Item 7. Next Steps**

Chair Zarnikow thanked the members for their attendance and participation at the second meeting of the task force. He advised that the next meeting was scheduled to take place on Thursday, August 25, 2022 and that it would be the final meeting before the October 1<sup>st</sup> due date for the first draft of the report.

### **Item 6. Public Comment (Information)**

Member Hershman **MOVED** to allow Katie Steen to speak for no more than three minutes about cost savings. Member Murphy seconded that motion, which was unanimously approved by the task force.

Katie Steen acknowledged that she is a member of SPARC and that she presented at the

previous meeting but stated that she requested to speak at this meeting in her capacity as an Illinois resident and member of the public. She spoke about the need for a consistent formula to evaluate cost savings.

Seeing no further business to come before the task force, Member Knox **MOVED** to adjourn. Member Schumacher seconded that motion, which was unanimously approved by the task force.

The meeting adjourned at approximately 3:55 p.m.

Respectfully submitted,

Lisa Murphy-Coveny



**Agenda – August 25, 2022 (Meeting 4)**  
**Meeting of the College Course Materials Affordability and Equitable Access Task Force**  
Virtual Event

August 25, 2022

1 p.m.

1. Greeting (Information)
2. Presentations and Discussion (Information)
  - A. Cengage
  - B. College of DuPage
  - C. Discussion on Access Codes/Access to Online Homework
3. ISAC Update (Information)
  - A. Review of Proposal for Meeting Task Force Charge
  - B. Explanation of Draft Report Framework
  - C. Discussion on Draft Report
  - D. Plan to Collect Feedback for the Draft Report from Task Force Members
4. Approval of Minutes from Third Meeting (Task Force Action)
5. Reminders (Information)
6. Public Comment
7. Next Steps

**Meeting Minutes – August 25, 2022\***

***\*The August meeting was the last gathering of the CCM Task Force.***

**MINUTES OF THE  
ILLINOIS STUDENT ASSISTANCE COMMISSION  
COLLEGE COURSE MATERIALS AFFORDABILITY AND EQUITBLE  
ACCESS TASK FORCE  
VIDEO CONFERENCE  
Instruction to be provided by ISAC.org**

**August 25, 2022  
1:00 p.m.**

**MEMBERS PRESENT via WebEx:**

Eric Zarnikow, ISAC Executive Director and Task Force  
Chair Senator Laura Murphy, Senate Democratic Caucus  
Senator Sally Turner, Senate Republican  
Caucus  
Representative Dan Swanson, House Republican Caucus  
Representative Edgar Gonzales, House Democratic  
Caucus  
Lily Rocha, Young Invincibles  
Lindsay Anderson, Cengage  
Tom Loftus, Assistant State's  
Attorney Alli Gentile, Pearson  
Jeff Stowell,  
EIU Joan Knox,  
FIICU  
Cynthia Boyce, Lincoln Trail (Il Eastern Community  
Colleges) Melvin Harrison, ICCB (staff)  
Anne Craig, CARLI, based at  
UIUC Shawn Schumacher, IBHE-  
FAC chair  
Kelly Denson, Association of American Publishers  
Denise Cote, College of DuPage  
Richard Hershman, National Association of College  
Stores Tom Scotty, RedShelf  
Jennifer Becker, McGraw Hill  
Jill Dupy, Southern Illinois University  
Amy Spies, Illinois Open Educational Resources Stakeholders Group

**STAFF PRESENT via WebEx:**

Eric Zarnikow, Executive Director  
Shana Rogers, Managing Director, RPPA  
Katharine Gricevich, Director, Government Relations  
Susan Giberson, Senior Research Associate, RPPA  
Rich Nowell, Interim General Counsel  
Natalie Wandall, Administrative Assistant to the Task Force  
Kevin Bertolino, Research Associate, RPPA  
Manuel Talavera, Professional Development Specialist  
Dada Ibrahimovic, Professional Development Specialist  
Lisa Murphy-Coveny, Deputy General Counsel

**OTHERS PRESENT via WebEx:**

Rashawn Overton  
Hannah Keller  
Paul Ramey  
Megan McAtee  
Melanie Waters  
Jennifer Schultz  
Sam Stogsdill  
Matthew Almendras

The meeting of the College Course Materials Affordability and Equitable Access Task Force was called to order at 1:06 p.m.

Mr. Zarnikow, the Chair of the task force and ISAC's Executive Director, welcomed attendees and noted that the slide deck and the verbatim recording of the previous task force meeting were posted to isac.org. He also advised that the current meeting was being recorded and would be posted to the website within 24 hours.

He explained that, as with all public meetings, a specific time was reserved in the agenda for public comment. He reviewed the basic meeting procedures.

WebEx instructions were provided by Dada Ibrahimovic.

Chair Zarnikow called for a roll call of the task force. A roll call was taken, and a quorum was established.

**Item 1. Greeting (Information)**

Chair Zarnikow expressed appreciation for the attendance of task force members and turned the meeting over to Ms. Rogers, who reviewed the agenda and explained the presentation procedures.

**Item 2. Presentations and Discussion (Information)**

### **Item 2A. Cengage**

Megan McAtee explained Cengage Unlimited for Institutions' (CUI's) subscription service for course materials and Affordable Educational Resources (AER). She identified goals and benefits of the AER program for individual students, instructors, and institutions. There was discussion regarding the cost savings and value based upon participation rates and the possibility that some faculty would need to change their instructional materials. There was additional discussion of students' ability to rent print options and the possible options for further reducing costs.

### **Item 2B. College of DuPage**

Denise Cote discussed a OER pilot program at the College of DuPage. She described the goals and approaches of the Steering Committee as well as the budget and savings. In addition, she discussed the grant projects and methods of developing OER and the goals for the program moving forward. She noted the focus on zero cost textbook options. There was discussion regarding the plan for keeping the materials up to date as time goes on. There was also discussion regarding the basis for estimating the material cost averages and the number of students using OER.

### **Item 2C. Discussion on Access Codes/Access to Online Homework**

Ms. Rogers led a discussion regarding access codes and access to online homework. She indicated that she previously provided members with a spreadsheet containing student survey responses. She reviewed the material that was contained on the spreadsheet.

There was extensive discussion relating to the shift in publishing from print to digital, the correlation between courseware and homework platforms, and assessment tools. In addition, there was discussion regarding the difference between the ebook and courseware and first-hand accounts from two college/university professors spoke about their specific experiences using the digital materials. Finally, the discussion continued regarding student preferences, costs, and accessibility.

Ms. Rogers wrapped up the discussion and advised the members that the WebEx Q&A function was available for additional comments or questions.

### **Item 3. ISAC Update (Information)**

#### **Item 3A. Review of Proposal for Meeting Task Force Charge**

Ms. Rogers presented slides reviewing the proposal for meeting the task force charge. She noted that most of the tasks have been completed.

#### **Item 3B. Explanation of Draft Report Framework**

Ms. Rogers presented slides explaining the ten topic areas that became the research questions which provided the framework for draft report. She explained that secondary research, meeting presentations and the survey results were all resources used to create the draft report. She specifically noted that she may request additional assistance from members regarding study question #5. There was discussion about the method of delivery for inclusive and equitable access.

There was a slight pause and agenda items were completed out of order due to minor technical difficulties.

#### **Item 4. Approval of the Minutes from the July 21, 2022 meeting (Action)**

Chair Zarnikow stated that the minutes were previously distributed by email to each member for their review. He therefore dispensed with the reading of the minutes.

Chair Zarnikow asked members if there were any corrections to the minutes.

Member Loftus **MOVED** to approve the minutes of the July 21, 2022. Member Dupy seconded that motion which was unanimously approved by the members of the task force.

#### **Item 5. Reminders (Information)**

Chair Zarnikow reminded the members of their obligation to complete assigned training and submit ethics time sheets. He advised members to reach out to Ms. Wandall for assistance and thanked those who have complied.

#### **Item 6. Public Comment (Information)**

Chair Zarnikow reported that there was a question regarding how a task force member could respond to public comment. He advised that the members put any responses in writing and send them to ISAC for distribution to the other task force members.

Senator Murphy **MOVED** to allow Mathew Almendras to speak for three minutes on the topic of access codes and open education resources. Member Knox seconded the motion, which was unanimously approved by the task force.

Matthew Almendras, 3<sup>rd</sup> year student and student body president at UIC, spoke about some of the challenges regarding access codes and called for investment in OER.

#### **Item 3C. Discussion of Draft Report**

Ms. Rogers asked for feedback on the draft report. Member Spies expressed appreciation for the notations in the report alerting to areas where results should be viewed with caution. She noted that such transparency lends credibility to the report.

### **Item 3D. Plan to Collect Feedback for the Draft Report from Task Force Members**

Shana Rogers explained that she will place the report in google docs for the members to suggest edits prior to the October 1<sup>st</sup> due date. Ms. Rogers and Chair Zarnikow noted that once the draft report is published on October 1<sup>st</sup> there will be a time for public comment prior to the final report due date.

Chair Zarnikow thanked Ms. Rogers and her staff for their hard work creating the draft report and expressed appreciation for those who provided assistance and feedback.

### **Item 7. Next Steps**

Chair Zarnikow thanked the members for their attendance and participation at the second meeting of the task force. He advised that the meeting is possibly the final meeting, but additional meetings may be necessary to discuss the public comment and final draft.

Seeing no further business to come before the task force, Member Becker **MOVED** to adjourn. Member Hershman seconded that motion, which was unanimously approved by the task force.

The meeting adjourned at approximately 3:46p.m.

Respectfully submitted,

Lisa Murphy-Coveny

## **Appendix D: Task Force Presentation Materials**

### **Meeting 1 (March 28, 2022) Materials**

Meeting1 Presentation:

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/03-28-22-Meeting-Presentation.pdf>

### **Meeting 2 (May 12, 2022) Materials**

Meeting 2 Presentations:

A. University of Illinois Urbana-Champaign

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-05-12-22-Item-2A.pdf>

B. Scholarly Publishing and Academic Resources Coalition (SPARC)

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-05-12-22-Item-2B.pdf>

C. Consortium of Academic and Research Libraries in Illinois (CARLI)

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-05-12-22-Item-2C.pdf>

D. RedShelf

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-05-12-22-Item-2D.pdf>

E. Illinois Open Educational Resources (OER) Stakeholders Group

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-05-12-22-Item-2E.pdf>

F. Association of American Publishers (AAP), McGraw Hill, Pearson, and Norton

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-05-12-22-Item-2F.pdf>

Review of Plan for Meeting Task Force Charge and Updates and Review of Preliminary Student Survey Results (Information)

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-05-12-22-Items-5&6.pdf>

### **Meeting 3 (July 21, 2022) Materials**

Meeting 3 Presentations:

Review and Update on Task Force Charge

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-07-21-22-Item-2.pdf>

A. Eastern Illinois University

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-07-21-22-Item-3A.pdf>

B. University of New Hampshire - Dr. Michael Moore, Research Scientist

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-07-21-22-Item-3B.pdf>

C. Waubonsee Community College

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-07-21-22-Item-3C.pdf>

D. Midwestern Higher Education Compact (MHEC)\*

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-07-21-22-Item-3E.pdf>

E. OHIOLink

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-07-21-22-Item-3F.pdf>

F. Campus Bookstore Panel

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Documents/2022-Agenda-Books/Agenda-07-21-22-Item-3G.pdf>

\* Five (of the 23) Task Force members indicated they believe there are inaccuracies in the matrix/table provided in slide six of the MHEC Task Force presentation. This same matrix is also included in MHEC's report - *Toward Convergence, Creating Clarity to Drive More Consistency in Understanding the Benefits and Costs of OER*. Both of those sources are referenced above. Several of those Task Force members indicated they have vocalized their concerns to MHEC.

#### **Meeting 4 (August 25, 2022) Materials**

Meeting 4 Presentations:

A. Cengage

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Meeting-Schedule/agenda-08-25-22.html>

B. College of DuPage

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Meeting-Schedule/agenda-08-25-22.html>

C. Discussion on Access Codes/Access to Online Homework and ISAC Update

<https://www.isac.org/e-library/research-policy-analysis/Task-Forces-Working-Groups/CCM-Task-Force/Meeting-Schedule/agenda-08-25-22.html>



## **Appendix E: Survey Methodologies**

All student survey questions were shared and reviewed by ISAC Research Department staff and were also tested by a group of ISAC's ISACorps members, who are recent college graduate near-peer mentor college outreach staff, prior to launch. All school survey questions were shared and reviewed by ISAC Research staff and other internal ISAC staff, and all the College Course Materials (CCM) Task Force members, before e-mail invitations were distributed. Both surveys utilized peer-reviewed instruments from state and national course material affordability studies, all of which are referenced in the report, as well as the school survey instrument used by the Illinois OER Stakeholders Group.

The online Illinois College Course Materials Student Survey was administered via e-mail invitation by the Illinois Student Assistance Commission (ISAC). The ICCB distributed the online Illinois College Course Materials School Survey to all the Illinois community colleges. With assistance from the Illinois Board of Higher Education (IBHE), who provided contact information for all other MAP-approved schools, ISAC distributed the e-mail invitation to provosts or other academic leadership to Illinois public universities, private non-profit institutions, and the proprietary schools. ISAC also copied the Financial Aid Director at each institution since the Agency has a professional relationship with those staff. Since the survey most likely required each school to collect data from numerous areas with the institution, a PDF of the survey instrument was provided with the e-mail invitation that included the link to the online survey. Schools were asked to provide just one online survey response for their institution.

The student survey e-mail invitation was distributed in early March 2022, with one reminder sent to students in early April 2022. The student survey was closed at the end of May 2022. The school survey e-mail invitation was distributed in early May 2022, with a first reminder sent in mid-May 20, 2022. The mid-May reminder included a survey deadline extension from May 31, 2022 to June 15, 2022. Based on the response rate, another reminder message was sent on June 20, 2022, and schools were followed up with all throughout the month of June. Towards the end of May, ISAC worked with several Task Force members who have relationships with schools to reach out and encourage them to respond to the survey. The school survey was closed at the end of June 2022.

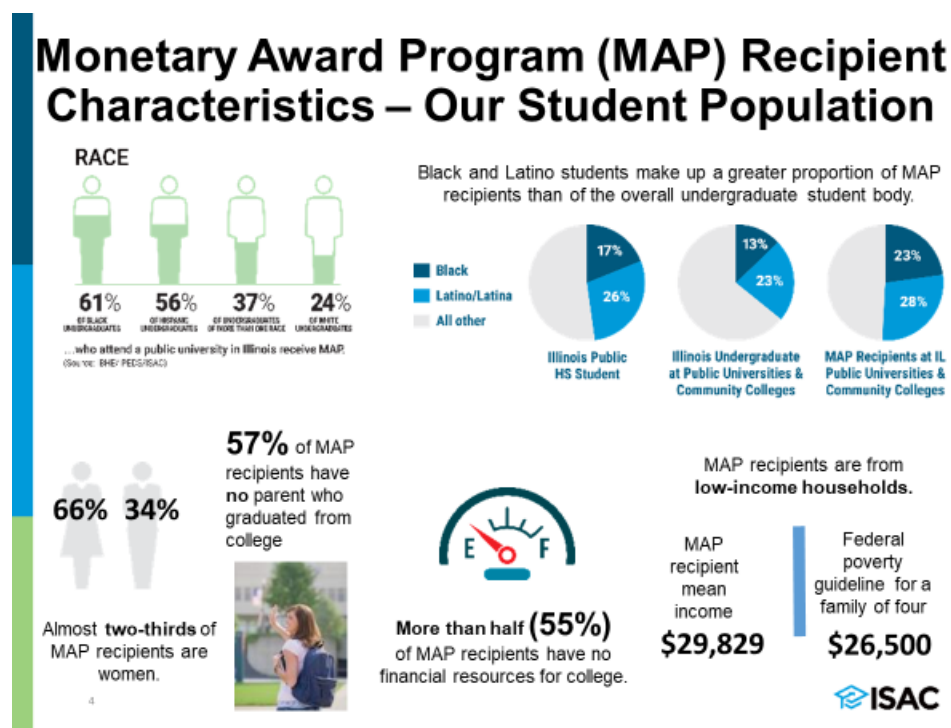
Nearly all questions on both survey instruments were based on the fall 2021 semester/term. College course materials were defined in both instruments as textbooks, printed materials, lab manuals, software, digital access codes, etc. that students are required to have for courses per the "Required Textbooks/Course Materials" section of course syllabi. They do not include items such as goggles, lab coats, kitchen knives, welding gear, uniforms, etc. that students may be required to purchase for a specific course. Multiple-choice and multiple-select items were analyzed quantitatively through descriptive analysis, with frequencies and percentages reported for nominal and ordinal-scaled variables. Means and medians were calculated for all continuous variables. Representative free response items were included to add further depth to the findings.

### ***Illinois College Course Materials Student Survey***

ISAC has access to Free Application for Federal Student Aid (FAFSA) data, including Illinois resident applicant e-mail addresses. The FAFSA is not only the application for federal student aid, it is also the application for the ISAC-administered Monetary Award Program (MAP), which is Illinois' large need-based college grant program for undergraduate students. ISAC is allowed to use FAFSA data to reach out to MAP recipients to complete the statutorily mandated,

biennial MAP Evaluation because the data collected can further the administration of the Program. ISAC Legal agreed to allow ISAC Research staff to include questions about the college course materials experience within the MAP recipient survey that was distributed in early March of 2022, before the first CCM Task Force meeting was held on March 28, 2022. It should be noted that CCM Task Force members did not have the opportunity to review the student survey instrument due to the timing of the distribution and the formation of the Task Force. The survey was sent to the nearly 140,000 fall 2021 MAP recipients, representing more than a quarter of all Illinois college undergraduates. These students are at MAP-approved schools, which include all Illinois public universities and community colleges, the majority of Illinois private non-profit institutions, and a handful of Illinois proprietary schools. The infographics in Figure 1 below highlight characteristics of the MAP recipient population. These are low-income students, who are more likely to be people of color and first-generation college students than Illinois undergraduates overall, and are the population most worried about in terms of affordability and equity in higher education.

**Figure 1: AY20-21 Monetary Award Program (MAP) Recipient Characteristics – the Student Survey Population**



About 12,600 students completed the MAP Recipient Survey; about 8,800 of those respondents (about 7% of the total population) answered the college course materials questions. It is common to get about 10 percent to respond for a population of this size. The number of questions we needed to ask students on college course materials was likely a deterrent. All segments of the survey population were represented in the findings, however, respondents were more likely to be independent, at a community college, first generation, older, and female.

Of interest, race/ethnicity of respondents by sector differed. About one-fourth of respondents in each sector indicated they were Hispanic/Latino, except at private non-profit institutions, where 43 percent reported they were Hispanic/Latino. Sixty-two to 65 percent of respondents in each sector indicated they were White, except at proprietary schools where 44

percent reported they were White. About 30 percent of respondents in each sector indicated they were Black, except at proprietary schools where 49 percent reported they were Black. Asian respondents were more likely to be at public universities (14%) and private non-profit schools (11%) than community colleges (7%) and proprietary schools (7%). Race/ethnicity on the entire MAP recipient population is not available for all schools for comparison purposes.

**Table 1: Illinois College Course Materials Student Survey Population Characteristics Compared to Respondent Characteristics**

<b>Demographics</b>	<b>Population N=132,369</b>	<b>Respondents N=12,600</b>
Dependent	68%	41%
Independent	32%	59%
Public University	36%	31%
Community College	34%	41%
Private Not-For-Profit Institution	27%	24%
Private/Proprietary Institution	3%	4%
First Generation	56%	64%
Under 24	72%	53%
24 or Older	28%	47%
Male	36%	25%
Female	64%	72%
Non-binary	N/A	2%
Hispanic/Latino	N/A	29%
American Indian/Alaska Native	N/A	4%
Asian	N/A	9%
Black or African American	N/A	25%
Native Hawaiian or Other Pacific Islander	N/A	1%
White	N/A	66%

\* Note: race/ethnicity is not available for fall 2021 MAP recipients yet. The most recent data available is highlighted in Figure 1 above.

### **Illinois College Course Materials School Survey**

Seventy seven of all 123 Illinois MAP grant-approved schools surveyed responded to the College Course Materials School Survey, resulting in a 63 percent response rate. MAP-approved schools include all 12 public universities (10%) and 48 community colleges (39%), 4 proprietary schools (3%), and the majority of (59) private non-profit schools (48%), and represent about 800,000 undergraduate students, with about 580,000 of those students certificate- and degree-seeking. Similarly, public universities made up about 13 percent of total school respondents (10 of the 12 responding), community colleges 38 percent (29 of the 48), proprietary schools 4 percent (3 of the 4), and 45 percent private non-profit schools (34 of the 59). School respondents represent about 336,000 undergraduates, or about 58 percent of all certificate- and degree-seeking undergraduates.

According to the Department of Education’s Integrated Postsecondary Education Data System (IPEDS), about 36 percent of all students at MAP-approved schools were Pell Grant recipients, 8 percent Asian, 13 percent Black or African American, 23 percent Hispanic/Latino, and 51 percent White. American Indian/Alaska Native and Native Hawaiian or Other Pacific

Islander students each represent less than 1 percent of all students. Whether a student is a first-generation college student is not reported in IPEDS. Respondent demographics appear similar to overall population demographics. Sixty-six percent of respondents reported that between 26 and 50 percent of their students received Pell grants, 18 percent 25 percent or less, and 16 percent that more than 50 percent received Pell grants. All respondents reported that 25 percent or less of their students were Asian. Ninety percent of respondents reported that 25 percent or less of their students were Black or African American, 7 percent 26 to 50 percent, and 3 percent more than 50 percent. Seventy-four percent of respondents reported that 25 percent or less of their students were Hispanic/Latino, 21 percent 26 to 50 percent, and 5 percent more than 50 percent. Fifty-six percent of respondents reported that more than 50 percent of their students were White, 30 percent 26 to 50 percent, and 9 percent 25 percent or less. Fifty-nine percent of respondents reported 26 to 50 percent of their students were first-generation college students, 30 percent 25 percent or less, and 12 percent reported that more than 50 percent of their students were first generation.

**Table 2: Illinois College Course Materials School Survey Population Characteristics Compared to Respondent Characteristics**

Demographics	Population N=123	Respondents N=77
Public University	10%	13%
Community College	39%	38%
Private Not-For-Profit Institution	48%	45%
Private/Proprietary Institution	3%	4%
First Generation	N/A	<10%: 6%; <b>11-25%: 24%</b> , <b>26-50%: 59%</b> ; 51-75%: 10%; >75%: 2%
Pell Recipient	36%	11-25%: 18%, <b>26-50%: 66%</b> ; 51-75%: 12%; >75%: 4%
Hispanic/Latino	23%	<b>&lt;10%: 37%</b> ; <b>11-25%: 37%</b> , 26-50%: 21%; 51-75%: 4%; >75%: 1%
Asian	8%	<b>&lt;10%: 87%</b> ; 11-25%: 13%
Black or African American	13%	<b>&lt;10%: 49%</b> ; <b>11-25%: 41%</b> ; 26-50%: 7%; 51-75%: 3%
White	51%	11-25%: 13%, <b>26-50%: 31%</b> ; <b>51-75%: 39%</b> ; >75%: 17%
Undergraduates	804,836 all undergrads; 580,151 degree- and certificate-seeking	335,532 About 42% of all undergrads About 58% of all degree- and certificate-seeking undergrads

- \* American Indian/Alaska Native and Native Hawaiian or Other Pacific Islander students are less than 1% of both groups.
- \* Respondent data is survey reported; population data is from IPEDS, and reflects AY19-20 (pre-COVID)

## Appendix F: Public Comments

11 October, 2022

OER Committee  
Consortium of Academic and Research Libraries in Illinois (CARLI)  
100 Trade Centre Drive, Suite 303  
Champaign, IL 61820-7233

Dear Committee Members,

I write on behalf of the 5000 members of Cook County College Teachers union in support of CARLI's efforts to advance consideration and discussions around open educational resources in Illinois. Specifically, we echo CARLI's statement that "...statewide support for the creation and adoption of OER is a crucial component of affordability in Illinois..." It is important for the College Course Materials Affordability and Equitable Access Collaborative Study Task Force to include OER options within their work.

Our union represents faculty, staff, and professionals in community colleges across Cook County. We believe that access to affordable higher education is vital in increasing opportunities for the residents of the State of Illinois. Reducing the barriers to access, through efforts such as OER and other open-licensed materials is important to building a more equitable and inclusive economy.

We support the work of CARLI's OER Committee and pledge to support their efforts on the campuses we serve. Please let us know if we can be of assistance to your efforts.

Sincerely yours,

Troy A. Swanson  
Legislative Chair  
Cook County College Teachers Union  
IFT, AFT, AFL-CIO

## College Course Materials Affordability and Equitable Access (CCM) Task Force

To whom it may concern:

A number of the Accounting, Business, and Supply Chain courses at Elgin Community College have been using Inclusive Access for several years, one of the options studied in the Illinois College Course Materials Affordability and Equitable Access Collaborative Study. These courses use materials provided by McGraw Hill and their Connect software.

Our path to Inclusive Access has taken many steps and years, trying to minimize the students' costs while providing the most benefit from the materials. Balancing these dual goals, we explored OER materials and Inclusive Access. OER materials did not provide the digital assignments needed with real world applications. We made the choice for Inclusive Access.

Because Inclusive Access is part of the course fees, financial aid and college payment plans absorb the cost of the books. Students see the entire amount of their tuition at the time of course enrollment. No more surprise costs in the book store.

Students were: (1) waiting for their next paycheck from work, balancing life costs (rent, insurance) with purchasing the course materials; (2) putting the book cost on a credit card, hoping the first tuition payment and book weren't on the same statement; (3) choosing to just attend class and not submit any work for a few weeks, hoping to catch up later when they could afford the book; and (4) trying to purchase textbooks online, not knowing that the access code would not work.

No more taking a chance with a 14 day free trial.

Students were (1) waiting as long as possible to use the 'free 2 week trial' provided with the book, hoping the loan got processed in time and dollars remain; (2) asking if they could have access to an entire course in the first 2 weeks of an 8 week summer course so they could complete the course without purchasing a book.

Inclusive Access has allowed us to provide students with an e-book and course assignment software at a much reduced cost. Just as importantly, Inclusive Access levels the textbook field for all students and removes a barrier to equity. When a student makes a financial arrangement for their tuition, the Inclusive Access fee is included. Scholarships, loans, grants, tuition payment plans, whatever method the student has chosen for their tuition, they no longer have a secondary financial decision to make, How do they pay for the required textbook? Because the textbook is required for course success. Every student regardless of their financial situation can begin the course work on day one. Removing one more barrier to success was an easy choice.

With the impact of the pandemic coinciding with Inclusive Access, data has been difficult to disaggregate. But as an instructor with courses across modalities, the absence of materials access issues has spoken loudly.

Regards

Prof. Ranae Ziowski  
Ms. Ranae Ziowski Professor I & Co-Director Alliance for College Readiness  
Elgin Community College  
1700 Spartan Drive, Office F207.06  
Elgin, IL 60123

Dear Task Force Members,

Congratulations on a detailed, thorough exploration of the practices and options for reducing the costs of learning materials in postsecondary education in Illinois. There is some amazingly valuable information contained in the report, including a careful treatment of MHEC's work to support the implementation of Open Educational Resources (OER) in Illinois. Regarding MHEC's work, our report, *Toward Convergence, Creating Clarity to Drive More Consistency in Understanding the Benefits and Costs of OER*, was mentioned several times. Most of the references to that paper were positive, and we hope it brings value to the work of the Task Force and to the state as institutions and states continue to measure and calculate the ROI of investments made in the use of OER.

On pages 120, 123, and 160, however, the following footnote appears in reference to the report: Five Task Force members indicated they believe there are inaccuracies in the matrix/table provided in slide six of the MHEC Task Force presentation. This same matrix is also included in MHEC's report - *Toward Convergence, Creating Clarity to Drive More Consistency in Understanding the Benefits and Costs of OER*. Both of those sources are referenced above. Several of those Task Force members indicated they have vocalized their concerns to MHEC. MHEC would like to share with the Task Force the same responses offered to those who reached out to us with concerns about the veracity of the table on page 9 of our report, which is entitled "Comparing OER to Alternative Models." (NOTE: I have attached the section of the report containing that table to this email for your reference.) MHEC suggests the authors of your report consider adding MHEC's response herein to the footnotes.

MHEC's Response:

Most individuals shared concerns about the information in the table pertaining to inclusive access (the last row of the table). Specifically, they thought it was a mischaracterization of inclusive access when MHEC indicated that such materials were never available to students in perpetuity and never free from sharing students' personal data with the provider of the materials. Those who reached out to us offered that students can often opt-in to retain access to their course materials past the end of the term in which the associated course is taught. Similarly, there are apparently opportunities for students to opt out of having data about them and their use of the learning materials collected by the software in which the materials are housed.

We listened closely to these concerns and responded to those who brought them to our attention with the following question: Are the opportunities for opting out and opting in prominently and repeatedly made apparent and offered to students when they interact with the materials and the software in which the materials are managed? We received responses ranging from nonresponses to those who indicated that such opt out and opt in opportunities were highly variable depending upon the contract the institution has with the provider, the material sharing options selected by the faculty member, and how industriously students seek out such options themselves.

After careful consideration of these responses, MHEC decided not to change the wording in the table. First, we are unaware of any instances in which students are proactively made aware of such opt in and opt out opportunities, and those who raised their concerns to us could not provide us with any examples of such opportunities proactively offered to students. Thus, we determined that such opportunities are essentially moot. Second, the intention of the table is to demonstrate the unique value proposition of OER when compared to other affordability and

accessibility learning material options. That unique proposition is that, unlike any other option, OER literally checks all the boxes and offers advantages that exceed those of cost savings and convenience. Unlike inclusive access OER is always available to students in perpetuity, and no data about the students who use OER are ever collected. For a more comprehensive treatment of the benefits OER offers for students and faculty, please see the attached section of our report.

We are grateful to the Task Force for its work and welcome future opportunities to share our work at one your meetings. Please do not hesitate to reach out to MHEC if you have any questions about our work or publications.

Sincerely,

Jennifer Parks  
Vice President  
Midwestern Higher Education Compact (MHEC)  
105 Fifth Avenue South, Suite 450  
Minneapolis, MN 55401



Thanks for this information. There's lots of useful content here, but digesting it is difficult. The "executive summary" is not truly an executive summary. It's 21 pages and repeats a great deal of the content of the main report almost word-for-word but without any graphics. Could the final draft include a 1-2 page set of key takeaways? I'd like to share the information with key campus administrators, but they're not going to read a 164 page report. Having a 1-2 page handout of key findings, preferably with infographics would really help folks actually understand and pay attention to the findings. I'm thinking of something similar to what CARLI does each year with its value letter:<https://www.carli.illinois.edu/sites/files/files/FY2020ValueGraphics.pdf>

Thanks,  
-Amanda

-----  
Amanda Pippitt, Associate Professor  
Director, Research/Instruction Librarian, & Archivist  
Staley Library, Millikin University  
University Commons 164  
Decatur, IL 62522

Good morning,

As the lead instructor for MRT-110, Medical Terminology, at a Community College, we have been utilizing inclusive access with McGraw Hill for the past few years and have seen improved student learning outcomes. Some additional benefits include:

- Cost savings for students.
- All students in this course have access to course materials on day 1. This has helped with both equitability and success.
- Students receiving financial aid or other funding can easily use that support to pay for access to the course e-book and adaptive learning platform.
- Allows students to access their course materials and learning platform from any internet available source. While also supporting off-line course resources.
- Tech support for both students and instructors is important and we have experienced incredible support from our publisher team.

Rita M. Kealy, MM, MLS(ASCP)  
(she, her, hers)  
Associate Professor  
Medical Terminology & Phlebotomy  
Phlebotomy & Patient Care Technician Coordinator  
Moraine Valley Community College

February 1, 2023

College Course Materials Affordability and Equitable Access Task Force  
Illinois Student Assistance Commission  
500 W. Monroe Third Floor  
Springfield, IL 62704-1876

VIA EMAIL: ISAC.CCMTaskForce@Illinois.gov

Honorable Task Force Members:

Thank you for the opportunity to comment on the draft of your study.

Congratulations on gathering and assembling a very comprehensive set of data concerning textbook costs and current practices. However, we have some concerns about the narrative that accompanies the presentation of that research.

OpenStax, part of Rice University, is the world's largest publisher of peer-reviewed, openly-licensed instructional materials (OER) for higher education. All of our instructional materials are available at no cost in a variety of digital formats, and are designed to be ready-to-use by faculty. All student materials can be downloaded free from OpenStax.org at any time without access codes and without needing to submit any user information. They are available "first day", any day, always.

More than 23 million students have used OpenStax textbooks in just our first ten years. And for some disciplines, OpenStax textbooks now lead the market in adoptions.

By choosing OpenStax textbooks for their classes, faculty have produced savings of more than \$1.7B for their students, compared with the cost of commercial textbooks. Since OpenStax is ready-to-use OER, the institutional costs for adoption are minimized, and are comparable to the cost of adopting commercial texts, regardless of the commercial model used.

In Illinois, more than 38,000 students are benefiting from OpenStax textbooks in the current school term, in 581 courses across 210 higher education institutions and high schools.

And our course offerings and faculty adoptions continue to grow. We've recently been selected by the Texas Higher Education Coordinating Board to create and publish a comprehensive free online curriculum for nursing education programs. This new series will reduce the high cost of course materials that is recognized as a significant barrier to entering the nursing profession.

We do all this because we know that free, high-quality instructional materials improve equity and access in all areas of higher education, a goal that we know you share.

Our main concern with the draft is the theme that OER and "inclusive/equitable access" are equivalent, or to quote the draft, "not mutually exclusive 'as a rule'". In theory, that may be true, and in fact OpenStax has provided materials through some inclusive access programs in the past.

But in current practice, inclusive/equitable access programs diminish or eliminate the benefits of zero textbook-cost courses for students, often include barriers to adoption of OER by faculty, and encourage or enforce a digital-only model which many students do not prefer.

1.) As per-course fee ("equitable access") programs are currently structured, savings from faculty adoption of OER go to the vendor, not to students or the institution. The vendor has zero cost of materials for that course or course section, but continues to charge the same per-course fee. We are not aware of any institutional agreements that require those substantial savings to be passed on to students through a reduced per-course fee.

This is hardly "equitable". Why should students pay for free materials? Moreover, why would any professor make the effort to create OER, or to search the OER repository for appropriate free materials, if their students get no direct benefit? The State of West Virginia recognized this shortcoming of equitable access programs and provided a statutory solution in HB 4355, passed during its 2022 legislative session. The law prohibits state higher education institutions from assessing a per-course or per-credit instructional materials fee:

" ... for a course or course section for which all required educational materials are generally available at no cost in at least one form to the student, such as:

(A) an open educational resource material;

(B) digital materials available at no cost through a multi-user license held by the institution's library; or

(C) other materials generally available at no cost and without limitation to all students enrolled in the course or course section."

In the absence of such a policy, equitable access programs discourage with the adoption of OER.

2.) Institutions that adopt inclusive/equitable access arrangements increasingly require that all instructional materials be provided through the vendor's electronic platform, even if they are otherwise free or faculty-produced. Faculty have reported to us that this makes it difficult to adopt materials that are not already provided by the vendor through the platform. This limits faculty choice and conflicts with the free provision of OER, since students are often assessed fees for the use of the mandatory platform, even when accessing free materials.

3.) The draft report highlights that a substantial percentage of students still prefer to use printed materials. For example:

"Forty-two percent of all Illinois student survey respondents (all MAP grant recipients who are lower-income students) reported their preferred course material format was traditional print textbooks."

But options for print copies of materials in inclusive/equitable access programs are often limited, when they exist at all. And printing from digital copies is heavily restricted or prohibited.

It is the stated goal of major commercial publishers to limit the number of print copies that they will sell, or to eliminate print completely. This is a sensible business decision for the publishers, as reselling of used print copies on the Internet has substantially cut into publisher earnings. But by limiting or eliminating print, publishers limit student options to use the materials best suited to their educational success.

By contrast, OER is free to print, in whole or in part, using any method the student or instructor chooses. OpenStax offers a low-cost print option, but we in no way restrict printing to just that option (nor can we, under the terms of an open license). A student, instructor or institution may print or copy OER in whatever way they want, and may edit or rearrange it to suit their needs.

For these and other reasons, we believe that inclusive/equitable access programs, as currently marketed and implemented, are mutually exclusive with the continued robust growth of OER. While we believe it is possible to develop an inclusive/equitable access program that would encourage the continued expansion of OER and the benefits it brings to students, we do not see a commercial incentive for textbook vendors to do so.

That leaves it up to higher education institutions, with appropriate support from their governing bodies, to make sure that student equity and access are placed first when agreeing to any textbook sales program. As part of that, institutions must make sure their participation in such a program does not diminish the impact or momentum of the substantial investments in OER made by faculty, institutions, governments and philanthropy.

We ask that you consider these concerns in the final version of your report.

Thank you again for your hard work on this important topic, and for your consideration of our comments.

Sincerely,

Daniel Williamson  
MANAGING DIRECTOR  
OpenStax, Rice University  
(404) 234-1845  
openstax.org

February 1, 2023

Illinois College Course Materials Affordability and Equitable Access Task Force  
Illinois Student Assistance Commission (ISAC)  
500 W. Monroe Third Floor  
Springfield, IL 62704-1876

VIA EMAIL: ISAC.CCMTaskForce@Illinois.gov

Dear Illinois CCM Task Force:

Thank you for the opportunity to provide comments on the Task Force's draft College Course Materials Affordability and Equitable Access Collaborative Study and for the opportunity to present to the Task Force during its May 2022 meeting. SPARC is a non-profit advocacy organization that supports systems for research and education that are open by default and equitable by design. Our membership includes more than 240 academic and research libraries across North America, including eight members in the state of Illinois.

We recognize that this study was a significant undertaking and acknowledge the extensive work that went into compiling this draft report. Our comments are focused on addressing several areas that would benefit from further elaboration, clarification, and transparency.

1. Use of the Term "Equitable Access" Our first concern is the Task Force's interpretation of the term "equitable access." Throughout the draft report, "equitable access" is used interchangeably with "equitable access program" to refer to a procurement model that charges students a flat fee for access to all of their course materials. However, this is not consistent with how the term "equitable access" is used in Public Act 102-0122. The law specifies that the Task Force's duties are to "examine the cost-saving methods and practices ... for improving students' equitable first-day-of-class access to required course materials..." Nowhere in the law is "equitable access" used to suggest a specific model, nor does it even appear on the list of models the Task Force is explicitly charged with studying.

This is a crucial misunderstanding. By equating the broader concept of "equitable access" with the procurement model sometimes known by that name, the draft report misses critical elements of what it means to provide truly equitable access. Students' ability to access course materials is affected by a multitude of factors, including whether they have reliable internet access, whether they have an up-to-date digital reading device, what disability accommodations they may need, what their format preferences are, or how heavily their finances rely on being able to shop around for the cheapest option. While it might be said that "equitable access programs" offer equal day one access, the concept of equity recognizes that not all students arrive on day one with equal circumstances and have different needs. A flat fee program might make the same digital materials available to everyone, but some students face additional barriers that make access inequitable.

We recommend that the final report clearly articulate the definition of "equitable access" and expand its examination of cost-saving models to address other barriers that impact students. We also urge the Task Force to replace the term "equitable access programs" with something more suitable in order to eliminate confusion. We suggest something descriptive such as "flat-fee programs" that can help readers distinguish this model from others discussed in the report.

2. Overemphasis on Procurement Models

Another overarching concern we have about the report is its central focus on procurement models, as opposed to strategies that can effectively reduce or eliminate costs. The high cost of textbooks is not a procurement problem; it is a market problem. The textbook market does not operate like a normal consumer market because students are captive consumers. Once a faculty member assigns a textbook, the student must buy it—regardless of how much it costs. While faculty have become more conscious of the cost of materials to students, not having to buy the materials themselves inevitably means there is an information imbalance that diminishes the role of price in decisions.

This market dynamic is the root cause of skyrocketing prices over the previous three decades, and it is not effectively addressed by any of the procurement models discussed in the draft report. In fact, they exacerbate it. Under the status quo (or “self-procurement” model), students at least have the agency to shop around for lower prices and other format 2 options. Inclusive access and flat-fee (“equitable access”) models take even that limited range of choice away from students, making them an even more captive market. On the faculty side of the equation, flat-fee programs dramatically reduce the incentive to consider less expensive materials, since there is no direct benefit to their own students.

If the goal is to save students money and provide equitable access on day one, procurement changes can only go so far. As SPARC noted in our presentation to the Task Force, the savings from procurement-central models like inclusive access come from charging students for a different format of the material, not from actually replacing an expensive material with a more affordable one. In fact, the bulk of the savings achieved through inclusive access are already available to students through the self-procurement model; unlike used books that have a limited supply, any student who wants an e-textbook from a major publisher can already buy one. However, as the report’s student survey data shows, a large number of students still make the choice to use print or are successful in finding a cheaper option on the secondary market. To the extent inclusive access saves these students money, it does so more by preventing their purchase of print than offering them a better option. Even if campuses are able to negotiate discounts off of market e-textbook prices, it does nothing to change the underlying dynamic of the market, and discounts will become meaningless if the publishing industry resumes its historical rate of price increases.

Of the primary cost-saving methods the report discusses, only OER offers a way to directly address the root of the problem by offering students free, high-quality options. We strongly recommend that the report explain the structural problems with the textbook market and analyze each of the cost-saving models through that lens.

### 3. Characterization of OER Implementation Costs

The report’s discussion of the costs associated with OER on pages 17 and 80-83 would benefit from clarification on several points.

While the report correctly identifies that some institutions devote resources to the development and maintenance of OER, these costs are fundamentally different than those associated with other models. Unlike traditional textbooks, OER do not need any complex procurement infrastructure or permissions clearance. For example, the largest publisher of open textbooks, OpenStax, publishes titles in dozens of high enrollment subjects that are openly licensed and used by thousands of faculty and millions of students for free. These 3 OER textbooks are maintained by OpenStax and look, feel, and act just like an expensive traditional textbook, right

down to an ISBN that faculty can provide the bookstore for optional print copies. Similarly, the University of Minnesota's Open Textbook Library maintains a catalog of more than 1,000 open textbooks that can be used by faculty anywhere. In these cases, the process of adopting OER is just like any other textbook.

The most common type of costs associated with OER are strategic up-front investments in expanding their creation, adaptation, or use. The Achieving the Dream OER Degree grant program referenced in the report is an excellent example of how such up-front investments in eliminating textbook costs can pay off in substantial savings over time. There are also excellent examples of this type of investment from Illinois institutions included elsewhere in the report. The difference between OER investments and other costs is that once implemented, OER can be used by students for free in perpetuity. That is in contrast to an inclusive access model, where each new class of students will buy the textbook over and over every semester, and the ongoing costs stack up quickly.

We recommend updating the report's coverage of OER implementation costs to make it clearer that OER does not necessitate any cost to the institution, and that the typical costs institutions do incur are strategic, voluntary, upfront investments, as opposed to long term or recurring costs. For the costs reported in the survey, it is essential to distinguish between those that are truly OER-specific and those that would be incurred regardless of the type of resource used. For example, it may appear that switching to an open textbook requires faculty to do a lot of work, but most if not all of the work is simply because they are switching to a new textbook at all, not because the textbook is OER. If this is not known, we encourage the Task Force to publish the survey instrument, as the exact wording of the question would provide helpful insight on this and other points.

#### 4. Transparency in Task Force Membership

Finally, we would like to raise two concerning issues with the Task Force's membership. As we and others have noted, the sole position designated for a student (the Student Advisory Committee member) has been listed as "pending" since the Task Force's inception. As the constituency most affected by the decisions made by the Task Force, students clearly ought to have a seat at the table, and the lack of a confirmed student Task Force member during meetings and the drafting of this report is a significant concern. Additionally, it appears that a seat intended for a representative from an Institution of Higher Learning was instead filled by a member affiliated with the publishing company McGraw-Hill. This is on top of

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three other Task Force seats held by large publishers and their trade association. We strongly encourage that the final report explain the reason for these discrepancies, along with any steps taken to address the potential for bias arising from the absence of a student member and overrepresentation of publishing companies on the Task Force.

Thank you again for the opportunity to submit these comments. We hope you will consider our recommendations as the Task Force completes the final report.

Sincerely,

Nicole Starr Allen  
Director of Open Education



Katie M. Steen-James  
Manager of Public Policy & Advocacy

Thank you for your work on finding high-quality, affordable solutions for textbooks for Illinois community college students.

I am writing this e-mail to echo some of the comments in the report and to discuss our Psychology department's experience with inclusive access. We use an online textbook in Connect Psychology, an educational platform through McGraw-Hill designed for individually tailored online instruction. All parttime and full-time faculty use this tool for our two highest enrollment classes - Introduction to Psychology and Lifespan Psychology. Our outcomes data has shown that this can help further support students in all formats to work effectively and be successful in mastering psychological concepts when they use this platform/tool.

Most recently, we switched to inclusive access and saw greater success rates for students in the 0 to 17 age category, which could be due to expanding our use of Connect Psychology and implementing inclusive access so that all students have access to the text and Connect Psychology assignments. Students in our traditional age category most likely benefit from the adaptive and mobile technology that goes along with this inclusive access to Connect Psychology.

So inclusive access is not only helping students get a very affordable, high-quality, well-researched, up-to-date textbook, it is also providing them with technological tools based on psychologically sound educational principles that lead to a deep level of student engagement with the textbook content. So, reducing the cost of textbooks alone is not ultimately helpful to educators or students if the students are not reading or engaging with that textbook content, which quality content and inclusive access can address. Further, students are disadvantaged if they do not start a course with access to their course textbook and educational tools. Providing inclusive access has shown through our data to be very valuable to student success and retention.

Thank you very much for your time and consideration of this comment,

Heather

Heather LaCost  
Professor of Psychology  
Waubonsee Community College  
Route 47 at Waubonsee Drive  
Sugar Grove, IL 60554

Dear CCM Task Force,

Congratulations on your work over the last year and the report you just released and thank you so much for giving me the opportunity to present to you. The recent report that you wrote is truly comprehensive and provides a lot of information that will help Illinois make good decisions about how it supports students in getting easy access to affordable and high-quality course materials.

I did notice a mention of the report that I authored for MHEC and wanted to ensure I clarified the purpose of a matrix that you referenced a number of times in the footnote. I think it's important to note that both the footnote in the MHEC report and my presentation both acknowledged that the matrix was generalized and based on the most common understanding and that the table might look different for different contexts. This table was developed by the stakeholder group which debated and came to a consensus on where each alternative typically fell. Different stakeholder groups may come up with different outcomes. This matrix is meant to be a tool to guide discussion and create transparency. We encourage you to use it as such and feel free to put forth your own version. However, the MHEC report and slide show are accurate in that the expert working group for this paper used criteria to assess where different alternatives fell and landed on the matrix that was published.

I also want to elevate two of the principals in the MHEC report. Principal 3: Costs should account for implementation costs unique to OER and Principal 4: Adopting/adapting existing OER can reduce costs that the conversation. The discussion on page 82-83 could benefit from some additional context that could account for the costs of course development that were unique to OER, as opposed to implementing a standard learning resource. Additionally, the discussion doesn't acknowledge the broad availability of existing resources that individuals have to draw from or the fact that OER development costs are one-time costs. These are important factors the discuss when discussing costs which is why we included them as principals in our report.

I write you with these insights not as a representative of MHEC, but as the author of the report. I want to make sure that the work is accurately reflected. I hope you will consider editing your footnote and consider the impact that applying the principles listed above might have on your final report.

Sincerely,

Katie

Katie Zaback  
zabacksolutions.com