

**State University System of Florida
Textbook and Instructional Materials Affordability
Annual Report
Statutory Due Date: September 30**

Florida International University	Fall 2017 and Spring 2018
University Submitting Report	Semester(s) Reported*
September 5, 2018	
Date Approved by the University Board of Trustees	Signature of Chair, Board of Trustees
	
Signature of President	Signature of Vice President for Academic Affairs
9-20-18	9/6/18
Date	Date

*Report Fall and Spring data separately to allow for Fall to Fall semester comparison and Spring to Spring semester comparison.

Definitions:

- *Wide cost variance is defined as a cost per course section of \$200 or more over the median average cost of textbooks and instructional materials for the same course.*
- *High enrollment is defined as the top 10% of courses ordered by headcount enrollment.*

1) Required and Recommended Textbooks and Instructional Materials for General Education Courses

a) Report on the course sections identified as wide cost variance and include the number of course sections within a course (*n*). An explanation may be provided for sections with wide cost variance (e.g. honors course, economics text for two courses).

Methodology: Identify the median average cost for textbooks and instructional materials for all course sections of a course. Exclude sections with Open Educational Resources (OER) or no required materials from wide cost variance analysis. Course sections with a cost of \$200 or more over the median cost are considered wide cost variance.

- Required (Req) Textbooks and Instructional Materials
- Recommended (Rec) Textbooks and Instructional Materials

Fall 2016

Prefix and Course Number	Course Title	Section	Total Number of Sections within Course	Req or Rec	Average Cost	Dollar Variance
ECO 2013	Principles of Macroeconomics	U3M, U4M, U5M	6	Req	\$389.00 (retail)	\$225.45
ECO 2023	Principles of Microeconomics	U3M	5	Req	\$389.00 (retail)	\$213.85
GEA 2000	World Regional Geography	U01	4	Rec	\$369.90 (retail)	\$206.55

Explanation:

From consultations with the department chairs and instructors, we can report that:

For ECO 2013 and ECO 2023, the instructor of these sections requires the same textbook for both courses, Principles of Macroeconomics and Principles of Microeconomics, which is clearly stated on the courses' syllabi. The majority of students take both courses, in which case the actual maximum cost to a student is \$194.50 per course and thus there is in fact no wide cost variance.

For GEA 2000, the full retail price of \$369.90 reported for this course includes the required textbook priced between \$82.20-\$182.65 plus the recommended textbook priced between \$74.90-\$187.25 through the Barnes & Noble FIU book stores. While both required and recommended course materials must be considered for the variance analysis according to HB 7019, the wide cost variance for this course only computes due to the additionally recommended textbook that other instructors for this same course do not suggest as a valuable learning resource to their students. Thus, the wide cost variance may not apply for this course depending on the students' personal preference of acquiring the recommended text or not.

Spring 2017

Prefix and Course Number	Course Title	Section	Total Number of Sections within Course	Req or Rec	Average Cost	Dollar Variance
ECO 2013	Principles of Macroeconomics	U3M, U4M	8	Req	\$428.00 (retail)	\$299.45
ECO 2023	Principles of Microeconomics	U3M, U4M	10	Req	\$428.00 (retail)	\$253.35

Explanation:

For ECO 2013 and ECO 2023, the instructor continues to use the same textbook required for both, Principles of Macroeconomics and Principles of Microeconomics. He also allows the use of older editions, which are often cheaper. This is clearly stated on the courses' syllabi. The majority of students take both courses, in which case the actual maximum textbook cost to a student is \$214.00 per course and thus there is in fact no wide cost variance.

Fall 2017

Prefix and Course Number	Course Title	Section	Total Number of Sections within Course	Req or Rec	Average Cost (Retail)	Dollar Variance
ECO 2013	Principles of Macroeconomics	U3M, U4M	8	Req	\$401	\$224
ECO 2023	Principles of Microeconomics	U3M, U4M	14	Req	\$401	\$211
WHO 2001	World Civilizations	B51	4	Rec	\$334	\$247

Explanation:

Courses ECO 2013 and ECO 2023 sections U3M and U4M, respectively, see same explanation as for Fall 2016 and Spring 2017.

Course WHO 2001 section B51 requires only one text at \$200, with two additional recommended texts at \$126 and \$8 that are optional for students to purchase.

Spring 2018

Prefix and Course Number	Course Title	Section	Total Number of Sections within Course	Req or Rec	Average Cost (Retail)	Dollar Variance
ECO2013	Principles Macroeconomics	U01, U07, RVD, U09, U3M, U4M	11	Req and Rec (various)	\$528	\$380
ECO2023	Principles Microeconomics	U08, U3M, U4M	15	Req and Rec (various)	\$520	\$372
SYG2000	Intro to Sociology	U03	11	Req	\$203	\$203

Explanation:

ECO 2013 and ECO 2023 sections U3M and U4M, see same explanation as for previous semesters. In addition, ECO 2013 section U01 also includes a recommended second textbook that is optional for students; sections U07 and RVD report the instructor's adoption as a choice between a newer or older edition to offer students savings, however, the system double-counted these options; and section U09 wrongly counted a falsely entered additional required text that was in fact not required, as per the course syllabus. In terms of ECO 2023, the instructor for section U08 entered the optional loose-leaf and hard-cover textbook for students to select either one, which are double-counted in our FacultyEnlight system.

The instructor for course SYG 2000 section U03 requires a textbook that exceeds the wide variance threshold of \$200 by \$3 while another instructor uses no-cost materials.

- b) Describe the textbook and instructional materials selection process for general education courses with a wide cost variance among different sections of the same course.

Academic Year 2016-2017:

Individual instructors for courses ECO 2013 and ECO 2023 select course materials from what is considered standard textbooks on the subject. The instructor whose textbook is generally more expensive than the textbooks chosen by other faculty of the same courses finds that the same textbook optimally covers the material for both courses.

Individual instructors for course GEA 2000 select course materials based on what they deem pedagogically best for their course. The instructor of section U01 recommended an additional textbook which is optional to students.

Academic Year 2017-2018:

Individual instructors for courses ECO 2013 and ECO 2023 select course materials from what is considered standard textbooks on the subject. The instructor whose textbook is generally more expensive than the textbooks chosen by other faculty of the same courses finds that the same textbook optimally covers the material for both courses. Instructors also allow students to choose alternate formats (i.e. digital vs print) to realize cost savings.

Individual instructors for course WHO 2001 select course materials based on what they deem pedagogically best for their course. The instructor of section B51 recommended two additional items which are optional to students.

In the case of SYG 2000 section U03, the instructor chose a textbook she considers the best for the expected learning outcomes. The department chair will mentor her to adopt a text from the choice of course materials required by other faculty.

c) Report the course title(s) and number of section(s) that do not require or recommend the purchase of a textbook(s) and/or instructional material(s).

Fall 2016

Course Titles not Requiring or Recommending Purchase of Texts/Instructional Materials	Number of Sections
846	1,745

Spring 2017

Course Titles not Requiring or Recommending Purchase of Texts/Instructional Materials	Number of Sections
756	1,488

Fall 2017

Course Titles not Requiring or Recommending Purchase of Texts/Instructional Materials	Number of Sections
773	1,707

Spring 2018

Course Titles not Requiring or Recommending Purchase of Texts/Instructional Materials	Number of Sections
845	1,867

As reported by course instructors in FacultyEnlight. *Please refer to Appendix A for a detailed list with Fall 2017 and Spring 2018 course titles.*

d) What measures, if any, are being taken by the university to reduce wide cost variance among different sections of the same general education course?

Department chairs have received the wide cost variance analysis for general education courses for which they have oversight. Chairs have consulted with faculty to identify best practices for the selection of course materials and the reduction of the cost variance where possible.

e) Describe the textbook and instructional materials selection process for general education high enrollment courses.

Methodology: Order courses (course prefix/number) by headcount enrollment, excluding honors courses. The top 10% of courses are determined as high enrollment. Provide the number of courses (n) reported on.

The selection process for Spring 2018 textbook and instructional materials for high enrollment courses (n=290) is completed either by the individual instructor (168 courses) or collectively by all instructors teaching the course (122 courses). Faculty are very conscientious when selecting the materials for their courses, always ensuring that the educational quality of the course materials serves the students' needs for optimal learning outcomes while looking for the most affordable options. Although there is no departmental requirement, many of the reported selections made individually are coordinated among instructors for affordability considerations.

Selection Process (Spring 2018)	Total number of courses	UCC/Non-UCC	Total instances of enrollment
Individual instructor text selection	168 (58%)	44/124	58,227
Collective instructors text selection	122 (42%)	43/79	46,967
Totals	290	87/203	105,194

As an example, the Director of Statistics and Certificate Program in Actuarial Studies, Dr. Hassan Zahedi, describes the common practice of faculty collectively selecting course materials for multi-section high enrollment statistics courses offered by his department as follows:

“For selecting a new textbook or changing an existing text to a new textbook the designated course coordinator, in consultation with the Director of the Statistics Program, collects a list of potentially suitable text books in the market for the course. The course coordinator then requests review copies of those potential textbooks from the respective publishers for circulation among all faculty who will be teaching at least one section of those course for their review and input. The criteria used by faculty to rank the assessed textbooks include:

- Affordability of the textbook for students
- Reputability of the author(s) and the publisher
- Clarity of the contents
- Clarity and comprehensiveness of the homework problems
- Clarity of the examples in the textbook which are based on the real data sets
- Integration and use of modern statistical packages within the text book
- Supplementary materials for the book (such as power point presentation, interactive tutorial programs, students' learning resources and their affordability, instructor resources and web-based auxiliary instructional tools)
- Flexibility of obtaining the textbook in an alternative format (hard copy, paperback, electronic)

Based on the inputs from all the involved faculty, the coordinator will rank the competing textbooks and recommend the top ranked textbook for adoption.”

2) Specific Initiatives of the University Designed to Reduce the Costs of Textbooks and Instructional Materials for General Education Courses

- a) Describe specific initiatives of the institution designed to reduce the costs of textbooks and instructional materials.

New, Used, Rental and Digital Options

Barnes & Noble FIU book stores continue to offer cost savings such as new, used, rental and digital textbooks with new titles continuously added. Students have the opportunity to save as much as 80% by purchasing textbooks in the various formats offered.

Barnes & Noble @ FIU Price Match Program

Initiated by the FIU Office of Business Services, in Spring 2016 Barnes & Noble launched the price matching program. Barnes & Noble is matching the prices for textbooks advertised or offered by a local competitor, BN.com, or Amazon. The program does not include price matching items from textbook marketplaces such as Amazon Prime (membership deals) or Amazon Warehouse Deals and does not include offerings from peer to peer marketplaces, aggregator sites, digital books, publisher direct pricing or bulk purchases/course fee pricing.

Financial Aid Book Advances

Students receiving financial aid and unable to afford required and recommended course materials may apply for a book advance through the Office of Financial Aid, which continually monitors student financial need including cost of textbooks. In Fall 2017, 4,874 students took advantage of the book advance program amounting to \$2,435,887 in aid. In Spring 2018, there were 3,926 students who received \$1,811,607 in

book advances. This aid ensures that students can purchase their course materials prior to the start of the semester and are prepared for class on the first day.

Financial Aid Book Advances		
Term	Student Count	Book Advance Aid Awarded
Fall 2016	4,726	\$2,543,364
Spring 2017	3,836	\$1,977,756
Sub-Total AY 2016-17	8,562	\$4,521,120
Fall 17	4,874	\$2,435,887
Spring 18	3,926	\$1,811,607
Sub-Total AY 2017-2018	8,800	\$4,247,494
Grand Total	17,362	\$8,768,614

Course Reserves

Course Reserves is a service available to FIU faculty that will house materials required for use in class. Course Reserves provides a location for these materials assigned to students enrolled in classes on a semester-by-semester basis. Materials may be in print, electronic, and multimedia formats in compliance with the Copyright Law of the United States. Whenever possible materials will be scanned as electronic documents and made available to students 24/7. This allows students to use either library materials, or professor provided materials, free of charge. In most cases, these texts and works may not be taken outside of the library which allows for more students to have access to required and recommended course materials.

The Library Circulation Desk reports that there are a total of 7,219 Course Reserves books, articles and files (Green Library: 4,634; Hubert Library: 2,027; Engineering Center: 558), which represents an 18% increase over the previous year (6,103 total course reserve items) and has enhanced availability of cost-free course materials at all three locations. During academic year 2017-18, a total of 4,978 course reserve loans (Green Library: 2,842; Hubert Library: 2,060; Engineering Center: 76) to students were recorded, which represents a 12% decrease over the previous year (5,669 total course reserve loans), indicating that student utilization of the available course reserves has declined.

Affordability Counts Initiative

Launched in June 2016, the Affordability Counts collaborative initiative from FIU Online, the FIU Libraries, and the Center for the Advancement of Teaching, aims at lowering the cost of course materials to \$20 or less per credit. Faculty are encouraged to adopt open educational resources (OER) or other low-cost course materials. as of the last award session in June 2018, over 175 faculty have participated in this program, with 240 courses designated as "affordable courses." The Affordability Counts committee reviews submissions and awards the Affordability Counts medallion to each qualifying course, which faculty can then display in their syllabus and online

course shell. Under the leadership of Assistant Vice President Joseph Riquelme, who serves on the Florida Virtual Campus Council (FLVC) on Distance Learning and Student Services, this important initiative is being shared with other FLVC SUS institutions who choose to collaborate. Since inception of the program, FIU courses awarded with the Affordability Counts medallion have saved students in excess of \$750,000. This figure does not include subsequent iterations of the course after the medallion was awarded, so savings are actually higher.

Incentivizing the Adoption of Open Educational Resources (OER)

OERs are low- or no-cost course materials that are in the open domain/openly licensed and generally allow for content adaptation to meet the respective class's needs. As a complement to the Affordability Counts initiative, FIU Online was awarded a \$60,000 grant from the Complete Florida Challenge, which will offer monetary incentives to individual faculty and faculty groups to adopt or modify OERs, and awards range between \$500-\$3,000. The initiative will be a pilot in the 2018-2019 academic year and will give preference to faculty teaching UCC and high-enrollment courses to further enhance our student success efforts during the critical first two years of college.

OpenStax Institutional Partnership Program

FIU was one of 11 colleges and universities in the country selected to be part of the 2017-2018 OpenStax Institutional Partnership Program. OpenStax is a nonprofit organization based at Rice University with a mission to improve student access to education through open access textbooks and educational resources. As an institutional partner, FIU received consulting services to assess and improve our open educational resources (OER) efforts, technical support for adoptions of OpenStax content, webinars, and more. Through the growth of OER adoptions as part of the OpenStax Institutional Partnership program, almost 6,000 students have benefitted from taking a course with OER materials and a course material cost of \$0 since July 2017. For the 2018-2019 year, we expect that over 13,500 FIU students will benefit from OER materials resulting in savings of more than \$1.3 million, as reported by OpenStax. This initiative was spearheaded by Academic Affairs and FIU Online with support from the FIU Libraries and the Textbook Affordability Task Force.

First Day Pilot Program

In Spring 2018, the Office of Business Services, in collaboration with select faculty, conducted a pilot of the First Day Program for two courses, SOP 3004 (2 sections within the course) and MCB 2000. This inclusive-access program – an initiative where roll textbook costs are included in the students' tuition so that immediately upon enrollment in a course, students have access to learning materials with the first day of class. It is specifically designed for courses with digital learning materials seamlessly delivered through the learning management system. The First Day Program discounted price is a result of the publisher, in this case McGraw Hill, lowering the learning material base price and the FIU Barnes & Noble bookstore lowering its profit margin. The "First Day" price is only available at the beginning of the term to leverage

affordability and the incentive to obtain study materials as early as possible for optimal learning outcomes and ultimately greater student success.

Results of the Spring 2018 pilot program: savings to students who opted in to participate in this pilot amounted to \$11,720.

Course	Student Enrollment	First Day Student Purchases	No Action	Sell Thru	Best Price/National Price	Student Savings
SOP 3004 U02	150	194	65	66%	\$72.50 / \$112.50	\$40 or 36% savings
SOP 3004 U01	143					
MCB 2000 U01	250	72	147	29%	\$70 / \$125	\$55 or 44% savings

Piloting of the First Day Program continued in Summer 2018 to ensure that the operational processes between all partners (FIU, FIU Barnes & Noble bookstore, publisher) are seamless. FIU will then expand the program to additional courses and publishers so that more students can take advantage of these significantly discounted course materials.

Textbook Affordability Communications Initiative

In addition to the institution's efforts to find innovative ways to reduce textbook and instructional materials costs for students, multiple messages are dispatched to the student body to create awareness of affordability options. These include reminders to look for low-cost options, shop around early for the best price, or to take advantage of the Price Match program at the Barnes & Noble FIU book stores. Such messages are distributed via e-mail, social media and electronic message boards.

- b) With implementation of the initiatives, has there been any reduction in cost of textbooks and instructional materials to the students? If there has been a reduction in cost, what is the average cost savings? Describe the average cost savings comparing fall semester to fall semester and spring semester to spring semester.

Barnes & Noble FIU Book Stores Discount Options

For Fall 2017 and Spring 2018 the Barnes & Noble FIU book stores offered 79.5% and 79.5% respectively of all textbooks as rental option with discounts of up to 80%. The utilization rates for Fall and Spring for rental was 46.3% and 49.1% respectively of all book transactions. The digital availability was at 39.9% and 38.0% respectively, with discounts of up to 60% and utilization rates of 17.7% and 11.3%. Used textbook

purchases represented 11.5% and 10.7% and used textbook rentals represented 9.2% and 8.1% of all textbook transactions.

By taking advantage of used, new rental, used rental, or digital discount options, students saved \$1,626,745 (18.6%) in Fall 2017 and \$1,478,137 (18.3%) in Spring 2018.

Barnes & Noble FIU Book Stores Price Match

The Barnes & Noble FIU book stores continue to offer the Price Match program which has garnered great results. For the past year, savings of \$22,656 in Fall 2018 and \$18,697 in Spring 2018 were passed on to students, bringing the program total to \$101,209 matched since inception in Spring 2016.

- c) With implementation of the initiatives, describe any reduction in cost variance among different sections of the same general education course. Describe the reduction in cost variance comparing fall semester to fall semester and spring semester to spring semester.

There has not been any reduction in cost variance to date for those sections previously identified. With the information, education and processes we have in place, we are confident we are preventing future variances from occurring.

3) University Policies for the Posting of Textbooks and Instructional Materials

- a) Describe policies implemented to ensure the posting of textbook and instructional materials for at least 95% of all courses and course sections 45 days before the first day of class. For course sections that require or recommend textbooks and/or instructional materials based on student individual needs (e.g. audition/performance, directed independent study, research topic) that may miss the posting date, please reference these as exceptions in 3(d).

FIU's Regulation 1103 on Textbook Affordability requires all instructors to post required and recommended textbooks and course materials 45 days in advance of semester start. The Office of the Provost has established a communication timeline to remind course instructors, chairs and deans each semester of the respective adoption deadline. The first notification is sent out 75 days prior to the start of the next semester. Repeat reminders follow 60 and 55 days out. As of 50 days prior to the start of the next semester, the respective department chairs are required to submit any pending adoptions on behalf of their faculty.

Faculty utilize Barnes & Noble's [FacultyEnlight](#) platform for textbook and course materials adoptions, which feeds this information into FIU's course registration system for all courses and course sections. In addition, Barnes & Noble maintains a searchable website for [FIU Course Materials](#) on which students can find required or recommended course materials by campus, term, department, course and section. The website also

details pricing options for all items (i.e. rent new, rent used, buy new, buy used, rent digital, buy digital) acquired through Barnes & Noble FIU book stores.

b) Are the policies effective in meeting the reporting requirement? If not, what measures will be taken by the university to increase faculty and staff compliance for meeting the reporting requirement?

The policies sufficiently guide the institutional policies and common practices for textbook and course materials adoptions and selections processes.

c) Report the number of course sections and the total percentage of course sections that were able to meet the textbook and instructional materials posting deadline for the academic year. Note: A course section is in compliance if all textbooks and instructional materials in the course section have been entered by the deadline.

A total of 8,247 (95%) course sections met the posting deadline of July 7 for the Fall 2017 semester. A total of 7,677 (97%) course sections met the posting deadline of November 22 for the Spring 2018 semester.

d) Report the number of course sections and the total percentage of course sections that were not able to meet the textbook and instructional materials posting deadline for the academic year. Provide an explanation as to why the course sections were not able to meet the posting deadline. Note: A course section is not considered in compliance if all textbooks and instructional materials in the course section were not entered by the deadline.

A total of 427 (5%) course sections did not meet the posting deadline of July 7 for the Fall 2017 semester. A total of 275 (3%) course sections did not meet the posting deadline of November 22 for the Spring 2018 semester.

An adoption is generally not made by the posting deadline because a course instructor has not been assigned at that time. This may be due to circumstances such as unforeseen changes among instructional faculty, or the likelihood that sections may be merged should there be less student demand than expected.

e) Report the number of courses that received an exception to the reporting deadline. Provide a description of the exception(s).

FIU decided not to institute the practice of submitting exception requests because our implemented policies and practices aim at full compliance with the adoption deadline so that exceptions are not needed. Since the legislative requirement took effect in July 2016, FIU has been in compliance with posting of textbooks and instructional materials requirements.