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Date: March 15, 2024

To: Dr. Warwick A. Arden
Executive Vice Chancellor and Provost

Charles A. Maimone
Executive Vice Chancellor, Office of Finance and Administration

From: Richard D. Berlin, III 
Associate Vice Chancellor, Campus Enterprises

Jeff Halliburton 
Senior Director, Auxiliary Services

RE: Equitable Access Course Material Program

In accordance with your memorandum of August 22, 2023 charging NC State Stores to lead an investigation and make recommendations for changes to course material delivery and specifically to evaluate Equitable Access (EA) programs for NC State, we are providing the attached report detailing our process, findings and recommendations for program implementation the spring term, January 2025.

The EA program as contemplated will ensure that students receive all of their required course materials (digital and/or print) for all classes in which they are enrolled by the first day of class. Unlike today, by automatically including course materials on the student bill, we also ensure that financial aid can be applied to course material expenses. Any student may “opt out” of the EA program if they believe that it does not benefit them based on their specific academic or financial circumstances. We anticipate a student cost per semester of between \$275-\$300, or \$550-\$600 per year, versus the university’s current estimated cost for books and supplies of \$869 per year.

Except for a default to utilization of digital course materials when available, for faculty there is no change in the process of adopting course materials. Open Educational Resources (OER), materials developed by faculty, as well as materials licensed by the Libraries, can all be incorporated into and encouraged as part of the EA program.

The Course Material Transition Group supporting this effort provided strong points and counterpoints and included stakeholders from student government, faculty, DELTA, Libraries, Faculty Senate, EMAS, Financial Services and Campus Enterprises among others. 83% of the group agreed that the process should move to EA implementation. Of the 17% that did not support moving forward, the concerns shared can be addressed as they have at other institutions that were part of our research. There was some dissent among group members as to a program starting date for this coming fall. To address this concern and provide time for program socialization with faculty and engagement with faculty governance, we are requesting authorization for EA program implementation for the spring term '25.

Our implementation process will begin with identifying an implementation team of students, faculty, campus stakeholders and vendor partners critical to a successful EA program rollout. We will look to the leadership across the impacted colleges and departments to assign the appropriate individuals from their respective areas.

Expected outcomes include:

Equitable Access programs support student success:

- Student Financial Aid can be unlocked for all required course material purchases
- Course completion, grades, and academic retention can improve via easy course material access
- Students do not need to choose field of study based on course material costs
- Student and family budgeting is predictable
- Costs savings versus the current \$869/year estimated cost of books and supplies
- Easy Opt Out provision to ensure that student and family choice remains fully available

Equitable Access provides a seamless faculty experience:

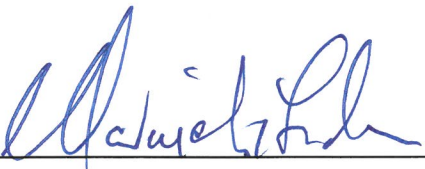
- Academic Freedom is intact, faculty can choose the required materials their courses need
- The digital-first approach ensures students have their course materials on day one
- EA programs are publisher agnostic
- Alternate content, such as OER, library content, and custom course packs live inside the program
- Content that is not available digitally is provided in print format, for the student to keep
- Digital content is usually available in print format, based on student choice, for a low per-copy cost

Equitable Access supports the institution:

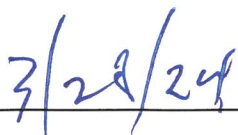
- Profits earned from EA support student scholarships, in alignment with the Umstead Act
- Campus initiatives like OER and DELTA investments are preserved with improved student access
- Close alignment with the university strategic plan, supporting multiple Wolfpack 2030 goals

Below we request your signature to launch an Equitable Access course materials program for NC State undergraduate students starting the spring semester, January 2025. With this approval we will form an implementation team of campus stakeholders and formally transition into the development and implementation of the program.

Recommendation Accepted:



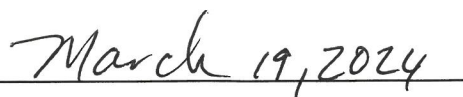
Dr. Warwick A. Arden
Executive Vice Chancellor and Provost



Date



Charles A. Maimone
Executive Vice Chancellor



Date

**Equitable Access:
A New Course Materials Program
for NC State University**

Submitted to:

**Dr. Warwick Arden, Executive Vice Chancellor and Provost
Charles Maimone, Executive Vice Chancellor**

Submitted by:

**Richard D. Berlin III, Associate Vice Chancellor, Campus Enterprises
Jeff Halliburton, Senior Director of Auxiliary Service, Campus Enterprises**

March 15, 2024

Report Outline

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Background

The Course Materials Transition Group (CMTG) was launched in order to study the transition away from the traditional “find and acquire” method of course material/textbook acquisition towards what are commonly referred to as Equitable Access course material programs. Recognizing the need to modernize the delivery of course materials at NC State, Provost/EVC Arden and EVC Maimone provided the following charge to Campus Enterprises and NC State Stores leadership:

“In alignment with the institutional responsibilities that NC State Stores fulfills related to course material list curation and supply, as more clearly defined in REG 07.10.02, POL 07.10.01 and REG 02.20.10, we charge you with convening a Course Material Transition Group to investigate Equitable Access programs and provide a recommendation about the future of course material delivery at NC State. This should include an implementation plan for Equitable Access for the fall of 2024.”

The charge further stipulated that the CMTG membership represents a broad cross section of NC State constituents. In order to fulfill this goal, members of university leadership at the college, office and department level were invited to nominate members of their extended organizational teams.

Following a two-week nomination process, the [CMTG roster](#) yielded nearly two dozen representatives from across the institution:

- Student Government - 3 representatives
- Office of the Provost - 3 representatives
- Academic and Student Affairs - 1 representative
- Informational Technology - 1 representative
- Libraries - 1 representative
- Enrollment Management - 1 representative
- DELTA - 1 representative
- Faculty Senate - 1 representative
- Finance & Administration - 3 representatives
- University Communications - 1 representative
- College of Engineering Faculty - 1 representative
- Campus Enterprises - 7 representatives

Campus Enterprises, serving as both the administrators of the committee and the PRR-defined business owners for course material list development and course material delivery at NC State, maintained a larger representation than other member areas.

Discovery Process

The CMTG gathered across 5 meetings during November and December of 2023 and January of 2024. The group met via Zoom, and meetings generally lasted one hour each. The meeting topics were varied, with background information reviewed at the start of the meeting arc, leading into peer reviews to learn from our institutional partners at the end of the arc. Following each session, meeting resources (slides, research, Zoom recording, etc.) were shared with the group in the CMTG Google Shared Drive.

Delivery Model Definitions

Until recently, course material delivery at NC State has been relatively unchanged since the university was founded. Under university REG 07.10.02 - Listing of Required Course Materials - they are more specifically defined as "...includ(ing) standard textbooks and manuals from publishing houses, reprinted or photocopied books or manuals produced by local vendors, digital content, e-books, instructor-produced content, alternate web content, or open educational resources (OER)."

Find and Acquire

The "*find and acquire*" method of course material procurement, as coined by Dr. Michael Moore, puts the burden of access on the student, where they must answer three primary questions:

- What materials are required for my classes?
- Where and how can I access (purchase, rent, borrow, check out, etc) the materials?
- Do I have the financial resources available to access the materials?

The "*find and acquire*" method runs counter to the other necessary learning and living resources that are provided directly by the institution, either with or without supplemental funding (student fee) support, such as fully funded and functioning libraries, learning technologies (e.g. computerized testing, distance/digital learning resources, learning management and student information systems, etc), internet access, health care, wellness and recreation resources, transportation and the like.

While the procurement modality (new vs. used purchase, rental, borrow) and material delivery method (physical vs. digital) has continued to evolve, the basics of find and acquire remain, with the student being at the center of the course material access equation, without extensive intervention or support provided by the institution.

Inclusive Access

As adapted from the National Association of College Stores definition, *Inclusive Access* is usually a negotiated cost and billing model where all students enrolled in a participating course have the opportunity to receive the required course materials through the Learning Management System by the first day of class, a provision to “opt out” and are typically billed for them directly through the institution as they would be for tuition or other institutional expenses.

All-In Inclusive Access at NC State - an Opt In Model

All-In is an Inclusive Access program that initially launched as a pilot in the fall of 2017. The All-In program is structured as a student Opt In program.

Opt In programs start like traditional IA programs, but they fall under a more traditional “find and acquire” model because students must choose to purchase continued access to maintain availability of the course material content after an initial trial period (through the census date).

- All-In is an instructor choice model, driven by the textbook adoption
- Students receive complimentary access to digital materials through the Census date
- Students must choose to purchase continued access if they want material use for the remainder of the term
- Certain publishers (e.g. McGraw Hill) do not support Opt In programs, and reverted all content to physical and/or digital access codes
- Inclusive Access programs continue to provide savings versus national Digital List Pricing
 - Initially, Inclusive Access programs were benchmarked against the New Print price
- Many digital courseware materials are not available via the campus store and are therefore not readily available to be purchase with pre-disbursement Financial Aid funds
 - Example: Cengage content like WebAssign is used at NC State in over 30,000 seats annually

Equitable Access

Equitable Access (EA) is designed to be a flat-rate course material pricing model that charges all students across a program or entire campus a fixed amount (either by an equal amount or by a set cost-per-credit-hour) for their required course materials, typically with an “opt out” provision. A more comprehensive counterpart to Inclusive Access, EA aims to improve affordability, equity, and access to course materials by setting one predictable cost for all students while allowing faculty to retain academic freedom by not limiting their choice of material.

Looking at it another way, for our definition of EA:

- Equitable Access is a course materials program that provides every undergraduate student with convenient, day-one access to all their required course materials at one predictable, equal, and affordable rate.
- Equitable Access eliminates the “find and acquire” process that students currently follow and ensures that instructor-adopted, required materials, are provided.
- Equitable Access is a digital-first program, with physical materials provided to all students enrolled in the class as required (e.g. course packs, print-only materials, lab manuals, etc).
- Equitable Access provides an opt out option, in accordance with Title IV of the HEA. Students who choose to opt-out of EA programs still have access to required course material adoption information (title, author, edition, ISBN) and are often provided a mechanism through the bookstore where they can still purchase course material access on an a-la-carte basis.

Why Equitable Access?

Support for Students

Day 1 Access | Provides access to all required course materials for all students in all courses on or before the first day of class. Materials adjust according to course adds and drops

Convenience | The learning management system (Moodle) becomes the "hub" for all digital course material delivery, streamlining student access

Equity | Materials are available for one low price; students select their discipline without regard for price of required materials; course/section selection is not price dependent

Student Success | Positively impacts student outcomes including retention, course completion rates, and course performance

Affordability | Affordable, predictable rate for all materials reduces overall course material costs

Support for Faculty

Faculty Overhead | Reduces classroom and student management issues; all students (remaining in the program) have access to the materials they need to be successful

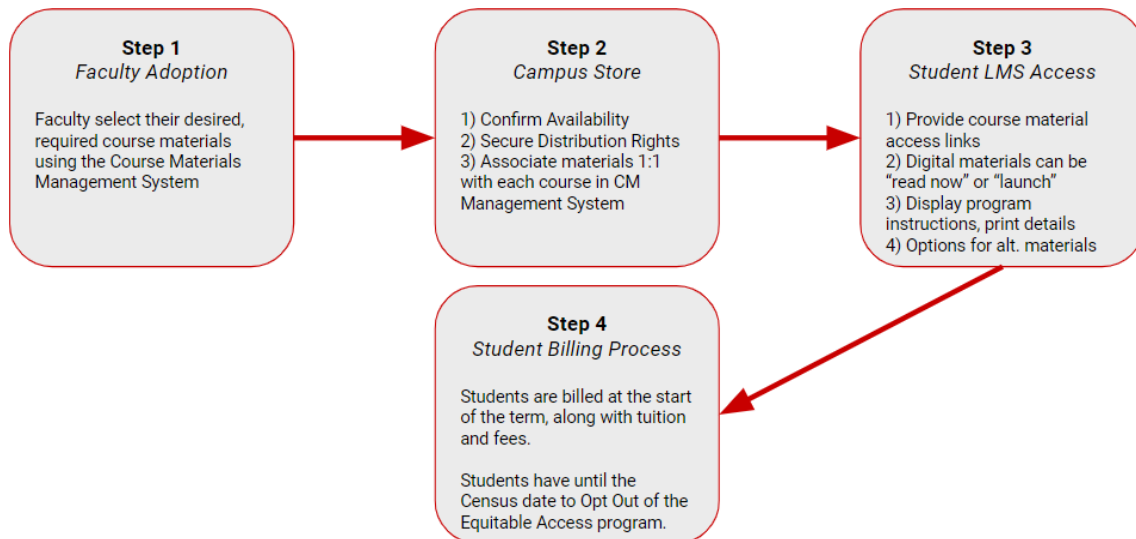
Academic Freedom | Preserves educators' right to select the materials most appropriate to the learning objectives of their course, including commercial, library and OER resources

Sustainability | Reduces the environmental impact of our course materials program

Enrollment | Supports institution student recruitment and student retention

Resources | Financial and programmatic resources stay on campus

How does an EA program function?



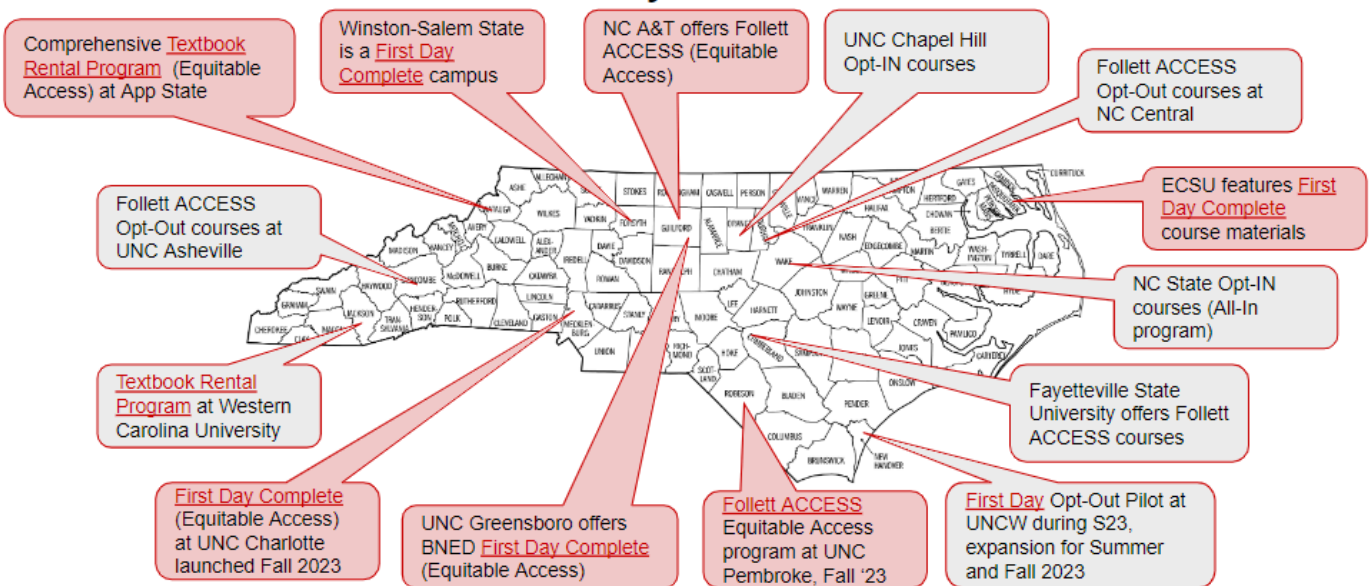
EA: Regionally, Nationally, and Peer Examples

Equitable Access throughout North Carolina

Equitable Access programs are currently in place at seven of the University of North Carolina System institutions, along with many community colleges across the state. While EA programs may be considered to be in the “Early Adopters” phase of Rogers’ [Diffusion of Innovations](#), successful implementations of EA are dramatically accelerating.

Each of the images highlight EA programs that are in place (red), as well as Inclusive Access programs (gray) throughout the UNC System. *Not illustrated are East Carolina University, UNC School of the Arts, and North Carolina School of Science and Mathematics.*

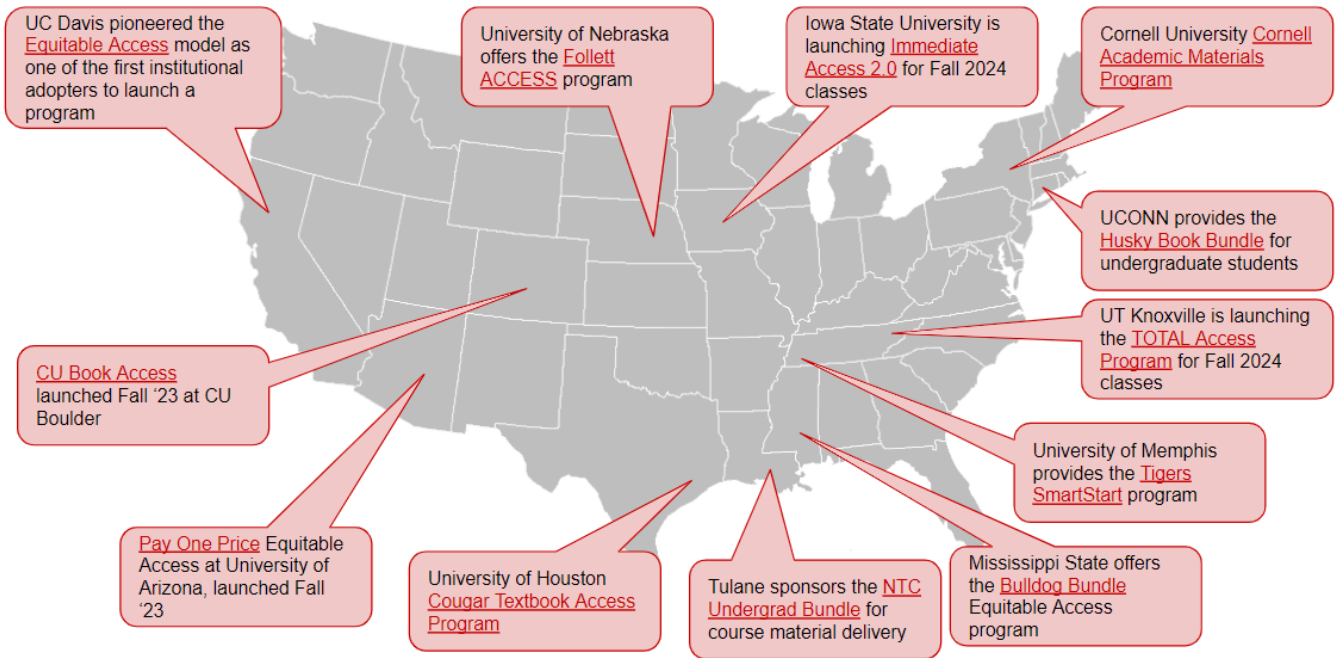
EA and IA across the UNC System



Equitable Access adoptions at R1 Institutions

Beyond the borders of our state, a growing group of Carnegie R1: Doctoral Universities are implementing Equitable Access programs for their undergraduate students. The UC Davis program may be considered the first among the group illustrated below, with a number of institutions preparing to transition their Inclusive Access programs to EA this fall (e.g. UT-Knoxville and Iowa State).

EA use is growing among R1 Institutions



Case Studies

Institutional Peer - University of California, Davis

The CMTG held a discovery session with Aaron Ochoa, Director of UC Davis Bookstores, to learn about their industry leading Equitable Access program.

Equitable Access, as a naming convention for day-one course material delivery programs, was coined at UC Davis upon the launch of their Equitable Access program during the Fall 2020 term. UC Davis had been developing the program structure for a number of years prior to the launch during the COVID pandemic. The program was launched at a per-quarter price of \$199, which has since been lowered to \$169. Summer access launched in 2022 for \$75.

A growing percentage of the undergraduate student population is now participating in the EA program at UC Davis. **For the 2023-2024 academic year, student participation is 85%.**

More information about the UC Davis Equitable Access program can be found via the following links:

Equitable Access Information Page:
<https://ucdavisstores.com/EquitableAccess>

Faculty FAQ:
<https://ucdavisstores.com/SiteText?id=74694>

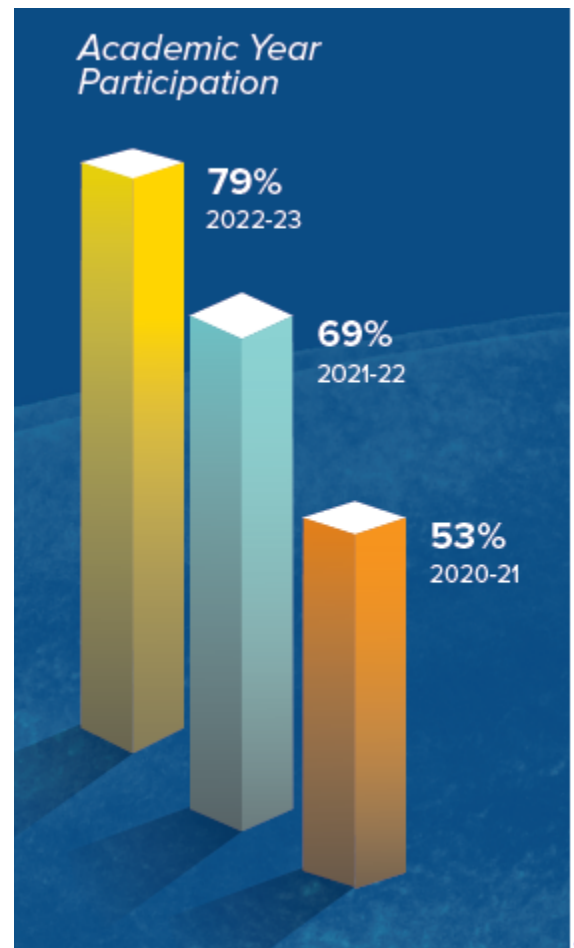
[2022-2023 Annual Report](#)

[2021-2022 Annual Report](#)

[2020-2021 Annual Report](#)

During a CMTG discussion an editorial from *The California Aggie*, the UC Davis student paper, was shared by David Tully (NC State Libraries) for our review:

[Equal pricing doesn't make Equitable Access an equitable program](#)



Source: UC Davis Stores 2022-2023 Annual Report

UNC System Peer - Appalachian State University

The CMTG reviewed a case study on App State's transition to digital as part of our discovery. The case study was presented by staff of VitalSource, App State's digital partner, due to a last-minute scheduling conflict with App State administrators. VitalSource, which is headquartered in Raleigh, is the digital delivery provider for NC State. NC State Stores has been using VitalSource and their Verba course material adoption and management tools for over 10 years.

App State may have been one of the earliest providers of what might be considered an EA-like program - their Textbook Rental program - launching nearly 90 years ago. Their transition to a primarily digital delivery model, however, is a relatively new step in their program's evolution.

More information about the App State Textbook Rental program can be found via the following links:

Textbook Rental Program:

<https://campusstore.appstate.edu/rental-program>

Student Textbook Resources:

<https://campusstore.appstate.edu/student-textbook-resources>

UNC System Peer - UNC Charlotte

The UNC Charlotte bookstore is operated by Barnes & Noble, and has been a long-term provider of auxiliary bookstore services for UNC-C. During the Fall 2023 semester, UNCC transitioned their traditional, blended Find & Acquire and Inclusive Access course material delivery programs to a cost-per-credit hour Equitable Access program which they are calling the *Niner Course Pack*.

UNC Charlotte provides extensive information about the *Niner Course Pack* online, and these resources can be found via the following links (in order of publication date):

[Faculty Kickoff Guide](#)

[Faculty & Advisor Information](#)

[Niner Course Pack Information](#)

SGA Recognizes Niner Course Pack program for improving affordability. September 7, 2023:
<https://aux.charlotte.edu/2023/09/07/sga-recognizes-niner-course-pack-program-for-improving-affordability/>

Niner Course Pack is coming this Fall. March 29, 2023:
<https://aux.charlotte.edu/news/2023-03-01/niner-course-pack-coming-fall/>

How to Save with the Niner Course Pack. April 27, 2023:
<https://aux.charlotte.edu/2023/04/27/how-to-save-with-niner-course-pack/>

Niner Course Pack Info Sessions. July 14, 2023:
<https://aux.charlotte.edu/2023/07/14/niner-course-pack-info-sessions/>

What to know before Opting-Out of Niner Course Pack. July 24, 2023:
<https://aux.charlotte.edu/2023/07/24/what-to-know-before-opting-out-of-niner-course-pack/>

More Niner Course Pack Benefits to get excited about. July 31, 2023:
<https://aux.charlotte.edu/2023/07/31/more-niner-course-pack-benefits-to-get-excited-about/>

Will you save on textbooks this spring? December 4, 2023
<https://aux.charlotte.edu/2023/12/04/will-you-save-on-textbooks-this-spring/>

Institutional Peer - University of Arizona

UA recently transitioned to a comprehensive Equitable Access program during the Fall 2023 semester. In late October 2023, Jeff Halliburton discussed the shift to EA with Peter Neff (Executive Director, UA BookStores) and Cindy Hawk (Assistant Director for Textbooks, UA BookStores).

Following extensive growth of their IA program over six or seven years, they knew that it was time to transition to an EA program. After discussing the benefits of a digital-first program with a senior provost, they met with the university president in November 2022. The main sentiment shared was, “why haven’t we already done this?”

With their president’s endorsement in hand, BookStores staff and other university stakeholders started to socialize the program to various constituencies during the late winter and spring of 2023, targeting a program launch at the start of the fall semester. The deep academic connections that were provided by library staff helped support an extensive outreach campaign to members of the faculty.

It should be noted that two main groups of students were not included in Arizona’s *Pay One Price* program upon launch - graduate students and their online campus. Even without these groups, UA dramatically exceeded their student participation expectations, retaining over 85% of undergraduate students in the program during the first semester (versus a goal of no more than 40% opting out).

More information about the University of Arizona Pay One Price program can be found via the following links:

Students: https://shop.arizona.edu/payoneprice_student

Faculty: https://shop.arizona.edu/payoneprice_faculty

UNC System Peer - UNC Wilmington

UNCW is a recent adopter of Inclusive Access course material delivery, partnering with their Barnes & Noble-operated campus store to launch an IA program during the Spring 2023 semester.

Having just passed the opt-out period for their 3rd long semester of their program, UNCW is now in the midst of campus discussions regarding a rapid transition to an EA model - what BNED refers to as *First Day Complete*. A member of the Faculty Senate's "Student Matters" committee connected with me over the phone to discuss their efforts and to inquire about NC State's plans for the future of course material delivery on our campus.

More information about the UNCW program can be found via the following link:

<https://uncw.edu/seahawk-life/services/bookstore/first-day>

Alignment with WOLFPACK 2030: Powering the Extraordinary

Equitable Access programs closely align with many of the goals that have been outlined in the university strategic plan.

Wolfpack 2030: Powering the Extraordinary Goals

- > **Goal 1:** Empower students for a lifetime of success and impact.
- > **Goal 2:** Ensure preeminence in research, scholarship, innovation and collaboration.
- > **Goal 3:** Expand and advance our engagement with and service to North Carolina and beyond, defining the standard for a 21st-century land-grant university.
- > **Goal 4:** Champion a culture of equity, diversity, inclusion, belonging and well-being in all we do.
- > **Goal 5:** Improve university effectiveness through transformative technologies, cutting-edge processes and actionable data.
- > **Goal 6:** Lead in developing innovative partnerships, entrepreneurial thinking and applied problem-solving.
- > **Goal 7:** Elevate the national and global reputation and visibility of NC State.

Goal 1 Alignment:

EA programs provide a digital-first platform for course material delivery that aligns with modern teaching and learning practices. By ensuring a predictable, fixed price for required materials, EA removes arbitrary barriers to student access to their desired field of study, and supports equity across academic disciplines. By implementing an EA program, NC State can be a leader in content delivery, “powerfully uniting digital tools with high-impact in-person engagement.” Student success, including course completion and retention, is supported by EA programs.

Goal 1, from the Executive Summary:

Executive Summary NC State students will acquire specific knowledge, skills and experiences – as well as the necessary values and dispositions – to not only excel professionally, but also to be leaders in advancing a productive and civil society. As a forward-thinking institution dedicated to excellence in teaching, we will be a leader in teaching and the digital transformation of higher education, delivering value to our students and ensuring the resiliency of our institution. Our faculty and staff will empower students to be entrepreneurial, independent and inclusive thinkers, strong in their disciplines and experienced in interdisciplinary collaboration, prepared to contribute impactfully in a diverse, global society. As they progress through their careers, NC State will provide relevant lifelong learning opportunities to assist in their personal and professional development to ensure they are not only NC State alumni, but also NC State students for a lifetime.

Goal 1, from the Exposition:

As a university, we will work to identify and remove arbitrary and inequitable barriers to the success of not only our students but also our faculty, staff and other partners. We will explore and implement effective ways to ensure greater accessibility to our university for those who want to join us in our mission of creating the next generation of Think and Do learners and leaders.

While technology continues to drastically change the world around us, NC State has remained at the forefront of welcoming and utilizing new forms of technology throughout our programs and curriculum. We will continue to evaluate and explore emerging and promising technologies that enrich the intellectual lives of our students, help them build essential technical skills and prepare them for a lifetime of professional, personal, civic and community prosperity.

The success of our students is greatly dependent on high-quality and relevant teaching from our excellent faculty. We commit to empowering our faculty and advancing our pedagogy in ways that best serve our students, whether they are learning in person, online or both. We aim to be leaders in content delivery, powerfully uniting digital tools with high-impact in-person engagement.

Goal 4 Alignment:

Equity lives at the heart of EA program design. By leveraging the aggregate purchasing power of our undergraduate students who participate in the program, we are able to institutionally leverage competitive pricing to lower the cost of course materials. Through flat-rate pricing, our EA program will ensure that all students are able to access the uniquely curated course material list for *their* field of study, at an up-front cost. Students will have less concern about choosing a field of study based on actual or perceived course material costs.

Goal 4, from the Executive Summary:

NC State's strength comes from all of its amazing people and their diversity of thought and experience. We believe that institutionalized inequality, including racism, is unacceptable in our nation and state, and on campus. We commit to creating sustainable systemic change across the university that improves our campus culture and empowers NC State to be a truly inclusive, welcoming and supportive environment for all. Therefore, as an institution, we must ensure an equitable, accessible and welcoming environment so all members of the Wolfpack community – especially those in underserved populations – feel respected, valued and a sense of belonging in every corner of campus. We will work to ensure diverse perspectives are

embraced at all levels, in all processes and through all decisions. We will work to promote the health and well-being of our campus community. We seek to invest our minds and hearts at the individual level, and our capacity and resources at the institutional level, to bring about and sustain needed change in a way that champions equity, diversity, inclusion, belonging and well-being at NC State.

Goal 5 Alignment:

The technology that underpins Equitable Access programs is not new, however our expanded implementation of it, along with stronger integrations into institutional tools (e.g. SIS, LMS) will allow NC State to flexibly support the academic and business needs of our students, faculty and staff. Our cross-campus partnerships with OIT, the Libraries, DELTA, EMAS and OFA will be deepened by collaborative problem solving throughout our EA program development, roll-out and future innovation.

Goal 5, from the Executive Summary:

NC State strives to exceed best practices through customer service, employee engagement and resource management using collaborative processes that leverage data and technology. We will pursue emerging technologies that connect and empower our campus community. We will be agile and flexible in adapting to change and the evolving needs of our students, faculty and staff. NC State commits to utilizing actionable intelligence to engage in more strategically focused planning and decision-making activities that benefit our students, staff, faculty, partners and the broader community. We will attain greater efficiency and effectiveness to ensure the resiliency of our institution.

Goal 6 Alignment:

By extending our partnerships with technology service providers, course material publishers, and our industry peers, we will drive innovation in the field and regain our standing as an institution at the forefront of course material delivery excellence.

Goal 6, from the Executive Summary:

At NC State, we recognize that many of society's toughest problems can only be solved through powerful multidisciplinary partnerships and an entrepreneurial approach. Our partnerships are numerous and varied, including partners in the academic, industry, government, community and nonprofit sectors. These partnerships are seen right here on campus, as well as across the state and around the world. We will remove barriers and achieve

success through an ongoing commitment to innovative partnerships that bring together the brightest minds in industry, government, community and the academy to creatively tackle the great global challenges. Through innovative partnerships, academics, and co-curricular and extracurricular opportunities, we will continue to fuel and elevate NC State's entrepreneurial ecosystem.

Goal 7 Alignment:

Students want to attend universities that provide them with the classes, spaces, and resources needed to be successful from their first day on campus. Ensuring that our students have access to all of their required course materials, at a predictable and affordable cost, will be an additional benefit to the NC State value proposition.

Goal 7, from the Executive Summary:

NC State has the opportunity to greatly amplify awareness of our strong brand and elevate our reputation to help achieve strategic goals and advance the university to unprecedented levels of success. To that end, we will establish and continuously promote an inclusive campuswide culture of teamwork, intentionality and awareness regarding strategies and tactics for enhancing our brand and reputation. We commit to leading and supporting universitywide systems and efforts that elevate regional, national and international awareness and impact of NC State's differentiators, competitive advantages and broad excellence. We will empower the campus community and key partners to be impactful brand champions. We will position NC State as a national and international leader in key areas of strength and opportunity that will continually advance the brand and reputation of the university and help achieve the goals of the strategic plan.

Academic Research about Equitable Access Programs

The field of academic research surrounding Inclusive Access and Equitable Access programs is starting to grow, especially due to research being conducted by Michael Moore, University of New Hampshire. Dr. Moore was an invited speaker for one of our CMTG discovery sessions, and he highlighted the impact of EA programs on CCR, or Course Completion Rate.

Moore, M. (2022, July 27). Equitable Access: A Participant v. Non-Participant Course Completion Rate Analysis from 2-Year Institutions. <https://doi.org/10.35542/osf.io/drqz9>

*Abstract: The course materials acquisition and delivery process is experiencing a transformational period driven, in part, by equitable access course materials models. No studies exist that examine the impact of equitable access course materials models on student outcomes. This study examined the course completion rates of participants and non-participants of an equitable access course materials model at two two-year institutions. It sought to understand if there was a statistically significant relationship between success rates and a student's participation status in an equitable access course materials program. Results of the study indicated statistical significance in all 13 demographic categories including a **15.58% increase in course completion rate in the total population**, a 21.06% increase in course completion rate for Black students, and a 17.46% increase in course completion rate for Native American students when comparing participant and non-participant populations. Furthermore, all category demographics analyzed were statistically significant at $p < .01$. **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, M. (2023, February 18). Equitable Access: A Course Completion Rate Analysis from a 4-Year Institution. <https://doi.org/10.35542/osf.io/g3wt4>

*Abstract: In higher education, course materials are experiencing an active disruption. This disruption is coming from equitable access, a course materials intervention model aimed at reducing the cost of and increasing access to course materials for students. The purpose of this study was to examine the use of an equitable access course materials model and its effect on student course completion rates. This study had a total population of 48,967. **The analysis documented statistically significant differences between the before and after equitable access implementation samples for seven of the twelve categories examined.** Black students (+1.75%), Pell grant students (+1.67%), Male students (+1.82%), Native American students (+16.51%), and Students Age ≥ 25 (+2.44%) had the largest increase in course completion rates when comparing the before and after equitable access implementation populations.*

CMTG Member Survey Results

We circulated a survey to the CMTG on Wednesday, January 24, to measure thoughts on what has been learned so far through the discovery process and to help determine next steps for the group and for course material delivery at NC State. 18 responses were received (out of 22 possible respondents), as well as many responses to the open-ended comment opportunity at the end of the survey.

- 1) I understand, in general, how Equitable Access course material programs work.
17 Strongly Agree or Agree; 1 Disagree

- 2) I feel informed about the pros and cons of Equitable Access course material delivery programs for students, families, faculty and administrators.
15 Strongly Agree or Agree; 1 Neutral; 2 Disagree

- 3) I believe that NC State students will benefit from an Equitable Access course material program.
12 Strongly Agree or Agree; 6 Neutral

- 4) I feel that the strengths of convenience, availability, accessibility and affordability outweigh the programmatic concerns that have been discussed during the CMTG meetings.
13 Strongly Agree or Agree; 3 Neutral; 2 Disagree

- 5) In comparison to the peers that we have learned about, what level of savings versus the current NC State "books and supplies" cost-of-attendance estimate of \$869 per year do you feel represents a material cost reduction for students?
Peer Institution EA Program Costs for comparison:
*App State University (\$270 per semester; \$65 summer)
*UC Davis (\$169 per quarter; \$507 per year; \$75 summer)
*UNC Charlotte (\$20/credit hour; or about \$270 per semester for the average 13.5 credit hours at NC State)
*University of Arizona (\$250 per semester)
1 for \$100 savings per year
2 for \$150 savings/yr
1 for \$200 savings
6 for \$250 savings/year or Approx \$300 EA cost per semester
6 for \$300 savings/yr or Approx \$275 cost per semester
1 for \$350 savings/yr or Approx cost of \$250/semester

----- **EQUITABLE ACCESS COURSE MATERIALS**

- 6) Please rank the importance of each of the following when considering the program as a whole (1 is Very Important, 4 is Not Important).
- a) Convenience of access to learning materials through the Moodle LMS
13 Very Important; 4 Somewhat Important; 1 Neutral
 - b) Easy Opt-Out process
15 Very Important; 3 Somewhat Important
 - c) Ability to pay for EA materials with Financial Aid
15 Very Important; 2 Somewhat Important; 1 Neutral
 - d) Affordability of Course Materials
15 Very Important; 2 Somewhat Important; 1 Neutral
 - e) Course Materials that are computer-device agnostic
10 Very Important; 7 Somewhat Important; 1 Neutral
 - f) Alternate purchase options for materials if a student Opts-Out of the EA program
9 Very Important; 6 Somewhat Important; 3 Neutral
- 7) Based on the research provided through the CMTG process, as per our charge, the CMTG should shift to developing an implementation strategy for an Equitable Access program (with an Opt-Out mechanism) for undergraduate students that will launch for the Fall 2024 semester.
15 YES; 3 NO

In addition to the seven primary questions that were surveyed, we also allowed CTMG members to share their thoughts about our discovery process, the survey, and our next steps. The full-text responses are included in the supporting documentation with this report, however there are a few primary themes that were shared:

- A realistic implementation timeline must be established
- Early, in-depth communication to the various stakeholders (students, faculty, etc) is of paramount importance
- There is a concern that EA may have a negative impact on existing efforts for Open Educational Resources (OER) at NC State
- Financial impact for students (and how it affects Financial Aid, cost of attendance, etc) needs to be better understood
- Will an RFP process be required to identify a program technology vendor
- Additional/more rigorous analysis is required to have a better informed opinion
- When will an endorsement decision be made, and will that support a Fall 2024 launch
- (EA) will be a game changer for students and families

Implementation Process:

Program Policies	Program Price	Partnerships	Integrations	Socialization
Student Opt-Out Models	Analyze historical costs & adoption trends	Technology	Student Information System (PeopleSoft)	Communication plan to educate community about EA
Billing Process	Review publisher pricing impacts	Digital/Print Distribution	Learning Management System (Moodle)	Campus Approval
Print / Print Option Parameters	Model participation rates	Publishers	Course Material Management System (Verba)	Engagement with appropriate campus stakeholders
Program Implementation Planning				

As the number of equitable access programs grows, the implementation processes have started to become streamlined and standardized, while recognizing that every campus situation is unique.

At this time there are a number of “to be determined” items connected to the development and implementation of an Equitable Access program. Upon formal endorsement from University leadership, we will convene a cross-campus implementation team to quickly scale and address these items.

In order to reach our goal of launching EA at NC State for the Spring 2025 term, we have identified the following milestones that must be achieved:

Step 1: Formal Endorsement

To help ensure institutional buy-in for a transition to EA, a formal endorsement of university leadership will provide the foundation to develop a successful program, publicize our programmatic shift, and implement our systems, processes and procedures across the campus community.

Requested Endorsement Date: no later than Friday, March 22, 2024

Step 2: Implementation

We received a strong consensus from members of the CMTG to transition our discussions into the implementation of an EA program at NC State. Many of our group members are leaders in connected areas across campus that will touch on a number of our implementation interface points as illustrated in the above graphic.

Our engagement with these campus colleagues will transition from one of discovery to one focused on implementation following the formal endorsement of the program. The implementation work will begin immediately and continue through the program launch in January 2025.

Leadership-level sponsorship of the program will help to reinforce the necessity of time-bound resources from our campus peers in support of this initiative.

Step 3: Announcement and Launch

In order to capture the largest messaging opportunity on campus, it is critical to begin socializing the shift in course materials delivery. As NC State welcomes a large and diverse class of first-year and transfer students during New Student Orientation this summer, it is critical that these students and their families receive early and frequent communication so they understand the depth and breadth of this program, as well as information that the course material model in place during the Fall 2024 semester will be changing.

We are working closely with UCOMM, campus and college communicators to craft an impactful and strategic communication roadmap.

Campus-wide Program Announcement: *To Be Determined.*

Supporting References

- 1) [CMTG Charge](#)
- 2) [CMTG Roster and Attendance](#)
- 3) CMTG Meeting Slides and Resources
 - a) [November 9, 2023 - Kickoff](#)
 - b) [November 29, 2023 - VitalSource Case Study \(App State\)](#)
 - i) [Case Study](#) - Creating a Digital-First, Student-Centered Future
 - c) [December 5, 2023 - Dr. Michael Moore EA/IA research](#)
 - i) [Moore presentation slides](#)
 - d) [January 19, 2024 - UC Davis Institutional Peer Discussion](#)
 - e) [January 26, 2024 - Survey Review and Discussion](#)
 - i) Includes text-based Survey Responses
- 4) Dr. Michael Moore Course Materials Research
 - a) [Inclusive Access Course Materials: An Analysis of Waukesha County Technical College's Inclusive Access Program](#)
 - b) [Doctoral Thesis: Inclusive Access Course Materials: The Impact on Student Outcomes](#)
 - c) [Equitable Access: A Participant v. Non-Participant Course Completion Rate Analysis from 2-Year Institutions](#)
 - d) [Equitable Access: A Course Completion Rate Analysis from a 4-Year Institution](#)
- 5) NC State PRRs
 - a) [REG 07.10.02 Listing of Required Course Materials](#)
 - b) [REG 02.20.10 Listing of Required Course Materials with the NCSU Bookstore](#)
 - c) [POL 07.10.01 Student Supply Stores Policy](#)
- 6) Automatic Textbook Billing Articles (curated by David Tully, NC State Libraries)
 - a) [That Digital Textbook? Your College Has Billed You for It](#) (New York Times)
 - b) [New Course Materials Models: Who Benefits?](#) (Inside Higher Ed)
 - c) [Giving automatic textbook billing a second look](#) (OpenStax)
 - d) [Automatic textbook billing: An offer students can't refuse?](#) (USPIRG)
- 7) Chronicle of Higher Education - Summer 2023 Courseware series
 - a) [The Substitute Teacher](#)
 - b) [The Homework Tax](#)
 - c) [The Textbook that Reads You](#)