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**MEMORANDUM**

To: CSU Presidents

From: Gerry Hanley  
Assistant Vice Chancellor, Academic Technology Services

Re: Timely Ordering of Textbooks to Ensure CSU Students  
Continue to Receive Federal Financial Assistance



**ATTENTION PROVOSTS:**  
Bi-Annual Reminder of  
Higher Education Opportunity  
Act (HEOA) requirements and  
recommendations for  
lowering the cost of course  
materials for students.

Date: September 23, 2016

In August 2008, the Higher Education Opportunities Act (HEOA) was signed into federal law. It requires that higher education institutions communicate the price of course materials to students at the time of registration (see below). These requirements went into effect July 1, 2010 and on July 1, 2013 a report on campus, college bookstore, and publisher implementation was due to the General Accounting Office and authorizing committees. There are a number of HEOA provisions that impact the CSU. **Complying with the HEOA requirements is a condition for the CSU receiving student financial aid from the Federal Government.**

This memo is the bi-annual reminder to campuses about the HEOA-TEXTBOOK INFORMATION requirements as the time to order course materials for winter and spring 2017 begins and to provide recommendations for supporting your campus' successful implementation of the requirements. The Chancellor's Office organized relevant information and created an FAQ for your campus community to learn more about the HEOA <http://als.csuprojects.org/heoa>.

The section in the HEOA on textbooks requires campuses to provide students access to textbook and course materials information associated with the individual CSU classes scheduled for each semester/quarter. These requirements are "to ensure that students have access to affordable course materials by decreasing costs to students and enhancing transparency and disclosure with respect to the selection, purchase, sale, and use of course materials." (See PURPOSE AND INTENT of Section 133 of HEAO for more details).

**KEY TEXTBOOK INFORMATION REQUIREMENT in HEOA**

**"To the maximum extent practicable, each institution of higher education receiving Federal financial assistance shall—Disclose, on the institution's internet course schedule and in a manner of the institution's choosing, the ISBN (International Standard Book Number) and retail price information of required and recommended college textbooks and supplemental materials for each course listed in the institution's course schedule used for preregistration and registration purposes" (see exceptions)**

## Recommended Campus Actions

- **Communicate HEOA requirements to faculty and others** who support the adoption of course materials. Emphasize the importance of providing course material and textbook selections by the campus due date, enabling your campus to provide the textbook ISBN and price in the course schedule prior to class registrations that begin March and April 2017 in compliance with HEOA.
- **Implement your Textbook Affordability Plans with the funding from AB 798:** Nineteen CSU campuses applied for state funding up to \$50,000 to pay for campus programs that lower the students' cost for course materials with free and open educational resources. Award letters will be distributed in the next few weeks.
- **Recommend Choosing Affordable Course Materials:** The textbook information requirements in the HEOA are driven by the goal of making higher education more affordable for students.
  - **Discover the new CA Open Online Library [COOL4Ed.org](http://COOL4Ed.org)** to view free and open etextbooks selected and reviewed by faculty in the CSU, UC, and CCC for **50 HIGH ENROLLMENT COURSES**. Case studies showcasing higher education faculty using free and open etextbook are located at [cool4ed.org](http://cool4ed.org), too.
  - Search the AL\$ website [AffordableLearningSolutions.org](http://AffordableLearningSolutions.org) to choose and provide more affordable, quality educational content.
  - Highlight the [CSU Rent Digital program](#) with over 60,000 e-textbook choices offering savings of 60% or more off the cost of new print textbooks. Available through your campus bookstore.
  - Use [CSU MERLOT](#) to discover more than **4,900 FREE and OPEN textbooks** and over 77,000 FREE course materials.
  - Blend the HEOA requirements into a broader [Affordable Learning Solutions campus wide campaign](#).
  - Work with your [Campus Bookstore](#) to provide lower cost course material alternatives.
- **Connect Affordability and Student Success:** Students are not buying all the course materials they need to succeed because they cannot afford them.
  - A motivating message for early course materials could be to “Help provide students more affordable options by providing course materials requests to your campus bookstore by the campus due date.”
  - U.S. Department of Education survey conducting in Florida found that 49% of the students sampled (over 20,000 in 2012) stated that they took few course units per semester because of the high cost of textbooks.
- **Textbooks and Financial Aid: What’s the Connection?** Faculty may not know that their campus’ ability to provide Federal financial aid to their students is dependent upon a wide range of requirements, including the availability of textbook information within the course schedule. Non-compliance could put at risk \$1+ billion in Federal student assistance

for our CSU students. Raising awareness of this requirement will help faculty understand why they are being asked to submit their book requests in a timely manner.

- **Accessibility of Instructional Materials:** Students with disabilities benefit with sufficient time to locate alternative formatted materials.
- **Consider incentives for faculty and departments** communicating their course materials to the campus bookstore in a timely manner.

Review procedures for dealing with cases when textbook information is not available by pre-registration (e.g. a faculty member hasn't been assigned to the course by the campus course materials due date). A subsection in the [HEOA](#) states:

“(B) if the institution determines that the disclosure of the information described in this subsection is not practicable for a college textbook or supplemental material, then the institution shall so indicate by placing the designation “To Be Determined” in lieu of the information required under this subsection;”

It is important that campuses make a best effort in providing the textbook information in a timely manner. Your strategies should continually improve the percentage of courses with textbook information available to students at preregistration.

If you have questions, please contact me at [ghanley@calstate.edu](mailto:ghanley@calstate.edu) .

cc:

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