**UNIVERSITY POLICY 204

TEXTBOOKS AND INSTRUCTIONAL MATERIALS**

**Executive Summary**

The development, selection, and organization of textbooks, documents and instructional materials for a class is a matter of a faculty member's professional judgment. In some cases, the preparation and sale of such materials to students raises concerns of potential copyright violations and conflicts of interest. This policy describes University procedures for addressing these concerns, specifies the primary criteria for selection, and lists actions required of the faculty or departments to ensure appropriate and timely selection of materials. Both federal law[[1]](#footnote-1) and University of North Carolina[[2]](#footnote-2) policies require that institutions take steps to control the cost of instructional materials; a list of current best practices designed to mitigate costs to students is provided below and their use strongly encouraged.

**I. Policy Statement**

The instructor of any course or the academic department has the responsibility to select the textbooks and/or instructional materials for use in teaching the course, using their professional judgment and avoiding conflicts of interest. These textbooks and/or instructional materials may be made available to students in print or electronic formats and may include but are not limited to:

* textbooks;
* substantive materials dealing with course content, including documents authored by the faculty member or by other faculty members in the department such as parts of texts, laboratory manuals, descriptions of experimental protocols, hypothetical cases for discussion, and similar items;
* substantive collected materials authored by the faculty member or by others inside or outside the University and reproduced from professional journals, periodicals, and books (i.e. course packs); and
* high quality Open Education Resources (OER) as well as other Open Access materials.

The primary criteria for selection of instructional materials are:

1. suitability of materials for the course; and
2. quality of the materials.

**II. Procedures**

**A. Orders**

All instructors and departments are required to provide the Campus Bookstore with their commercially available textbook and course material selections by established deadlines.

In addition to providing the Campus Bookstore with course material selections, instructors and departments may also submit their course material selections to off-campus vendors. However, because the Campus Bookstore is the exclusive on-campus buyer and seller of all commercially available course materials, and because some students are not able to use financial aid or University funded scholarships to purchase course materials (including subscriptions) from vendors other than the Campus Bookstore, instructors and departments are discouraged from promoting the sale of course materials by off-campus vendors. In addition, instructors and departments may not accept incentives or rewards from any off-campus vendor in exchange for sharing their course material selections.

When more than one section of the course is being offered, the department may elect to use a single text for all sections. The Department Chair or designated course master is responsible for communicating the selection to the Campus Bookstore.

**B. Book Selections**

In order to comply with federal law as well as UNC Board of Governors policy, the following practices are strongly recommended to reduce the cost of instructional materials to students:

1. Adopt the least expensive textbook that is pedagogically sound.

2. Notify, consult, and collaborate with [J. Murrey Atkins Library](http://library.uncc.edu/reserves) regarding the current and potential availability of course materials.

3. Select books and materials unbundled from ancillary materials whenever possible.

4. Use texts in the same edition for multiple years to enable buy-back and rental programs.

In preparation and distribution of instructional materials, the Campus Bookstore is responsible for obtaining copyright clearances in accordance with [University Policy 315, Copyright Policy](http://legal.uncc.edu/policies/up-315). Faculty members are responsible for properly addressing conflict of interest concerns in accordance with [University Policy 102.2, Conflicts of Interest and Commitment](http://legal.uncc.edu/policies/up-102.2), and for observing University requirements pertaining to the sale of materials.

**C. Conflicts of Interest and Sale of Materials**

1. If there is a potential monetary conflict of interest resulting from an instructor’s textbook selection, then prior to implementing the selection the instructor must report the potential [Category II](http://legal.uncc.edu/policies/up-102.2#CategoryII) conflict as set forth in [University Policy 102.2, Conflicts of Interest and Commitment](http://legal.uncc.edu/policies/up-102.2) and its [Supplemental Procedures.](http://legal.uncc.edu/policies/up-102.2-procedures) Only upon review by the Conflict of Interest and Commitment (COI) Manager and determination that the textbook selection does not constitute a conflict of interest may the instructor proceed with implementing the selection.

Potential monetary conflicts of interest include:

1. the instructor receiving royalties from the sale of a selected textbook or course pack, or
2. the instructor having a substantial financial interest in the company manufacturing the material under consideration.

2. The price for course packs or similar materials charged to students at the Campus Bookstore may, in the discretion of a department or college, also include a modest and reasonable surcharge earmarked for use by the originating department, college, or both. The proceeds from such a markup may be used by that department or college only for the purpose of developing, revising, and enhancing instructional materials produced by the department or college. The Campus Bookstore is permitted to include in the sales price of course packs sold to students a reasonable amount to recover its legitimate handling costs, pursuant to the University’s contract with the current Campus Bookstore service provider.

**Authority**: Chancellor

**History**:

* Initially approved April 21, 1986
* Revised July 24, 2015 (incorporating University Policy 205)
* Revised \_\_\_\_, 2023

**Responsible Office**: Academic Affairs

**Related Resources**:

* [Higher Education Opportunity Act Guidance](https://ifap.ed.gov/dear-colleague-letters/06-08-2010-gen-10-09-subject-textbook-guidance) (Information for Financial Aid Professionals)
* [University of North Carolina Report on the Cost of Textbooks](http://old.northcarolina.edu/finance/textbooks/Report_on_the_2013_Cost_of_Textbooks.pdf)
* [University Policy 102.2, Conflicts of Interest and Commitment](http://legal.uncc.edu/policies/up-102.2)
* [University Policy 315, Copyright Policy](http://legal.uncc.edu/policies/up-315)
* [J. Murrey Atkins Library, Course Reserves](http://library.uncc.edu/reserves)
1. Higher Education Opportunity Act Textbook Guidance, June 8, 2010: <https://ifap.ed.gov/dear-colleague-letters/06-08-2010-gen-10-09-subject-textbook-guidance> [↑](#footnote-ref-1)
2. Report on the Cost of Textbooks, March 2013: http://old.northcarolina.edu/finance/textbooks/Report\_on\_the\_2013\_Cost\_of\_Textbooks.pdf [↑](#footnote-ref-2)