ABSTRACT

Digital technologies are altering traditional landscapes and their effects are being felt throughout the learning content ecosystem. The essential role played by faculty is changing. Which, how, whether, and when course materials are adopted is up for grabs. Traditional relationships between the faculty member and the college store are changing, as well. College store professionals need to understand and interpret what’s happening with faculty to anticipate changing conditions and take necessary risks if they are to serve their students, faculty, and institutions well in the years to come.

INTRODUCTION

Like professionals in many other industries, college and university faculty have had to absorb a lot of change in the last two decades. There are the disruptions of a digitizing world: online learning dissolving classroom walls, and digital course materials encroaching on the empire of print. There is higher education’s “cost disease” and the pressure to treat it with improved productivity and greater cost effectiveness. Budget constraints, culture wars, and a variety of other forces have broken what was once a consensus view favoring generous public funding. Partly as a result, the professoriat contains proportionately fewer professors. While student enrollments have grown nearly 90% since 1975, tenure-line appointments have grown by less than a quarter. Filling the gap is a growing army of graduate students and adjuncts working “for less than half what a full-time professor makes, at a median wage of just $2,700 per course, with scant benefits, if any.”

There are also new educational players who bypass or outright contest historic faculty dominance over educational materials:

1. Publishers trying to replace dwindling textbook revenue and develop platforms and proprietary courseware licensed by the department or institution, not the instructor
2. Administrators with their own reasons to embrace these models
3. A menagerie of Internet startups and foundation-funded experiments providing instructional content—much of it priced at zero—that may lure faculty from traditional commercial sources
4. Students willing to substitute preferred—even pirated—content for assigned materials, even if faculty remain traditionalists

How faculty respond to and drive these changes has major consequences for the college store. Faculty learning content adoptions and referrals determine what the store stocks and who comes in to shop for course materials and other goods. Faculty acceptance of new forms of instructional content could either buttress the store against the declining business in print textbooks or channel those would-be revenues somewhere else. Faculty’s role in emerging modes of creating and distributing course materials will provide strong clues about how the market works in the next generation.
To illuminate these and related issues, the NACS Foundation commissioned a survey of instructors at NACS member institutions in fall 2014. Respondents included tenure-line (ladder) faculty, non-tenured instructors with security of employment, visitors, and contractors—all of who are referred to as “faculty.” The survey asked faculty members about the course materials they assign, how they select them, where they refer students for acquisition, what they expect from the college store and the library, and how they think course materials might evolve in the next five years. (See “About the NACS Faculty Survey” for more details.)

Faculty members responding to this survey show a strong preference for the print textbook but are also assigning newer formats. Most anticipate a general trend toward digital. Ladder rank (tenured or tenure track) faculty have far greater autonomy in making textbook adoption decisions than do contractors. Contractors, in turn, expect that course assignments will be increasingly standardized in the future. Practices around digital materials vary sharply by discipline, suggesting that we may see branching paths as e-textbook-friendly disciplines like mathematics, computer science, and health sciences diverge from less receptive fields like education and the humanities. Many faculty say they don’t know what’s going on with open educational resources (OER) in their disciplines, but those that do tend to believe they will be good instructional resources. Most responding faculty members view the college store as a service and order fulfillment provider. They look to academic colleagues, to their own professional judgment, and to a lesser extent, to the campus library for advice on course materials selections.

We summarize the results of the survey in the following pages. Where appropriate, we also refer to related findings from the NACS survey of member stores and NACS’ Student Watch™ survey conducted at the same time. These are marked by bolded Students and Stores identifiers.

We hope that this report will improve your understanding of faculty behaviors and needs, and help college stores navigate the same bumpy pathways that faculty tread.

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www.nacs.org/ecosystem
I. WHAT FACULTY ASSIGN

Print textbooks dominate faculty course assignment and use

- Print textbooks dominate faculty course materials assignments; eight in 10 report using them in their courses (Figure 1). The next most often assigned format is digital non-textbook materials (40%), followed by OERs (32%). Faculty usage of assigned materials in their courses follows a similar pattern.

- Only 10% of faculty surveyed do not assign textbooks. Rates of non-assignment go up with increasingly advanced instructional mix (7% of those mostly teaching lower division students, 19% of those teaching mostly graduate students).

- Three quarters of faculty expect students to read most (50%) or all (24%) of assigned textbooks. There are significant differences by discipline in assigning most or all of the textbook. Social sciences (90%), vocational/technical fields (86%), and health (78%) are the top three; engineering (62%), math (64%), and fine arts (65%) are the bottom three.

- Asked for the top three elements of a textbook they find most valuable, 54% choose the entire textbook, 35% exercises/problem sets, 30% “a few critical chapters.”

- Students: The print textbook is popular with students as well. Just more than half say their preferred course materials format is a print textbook either with (24%) or without (32%) a bundled additional digital component. One student in four says their preference depends on the class. Slightly more than half of students find their required course materials very useful or extremely useful.

It’s hard to find a scenario for growth in textbook assignment

- Despite high assignment and use rates today, faculty do not necessarily expect the textbook’s place at the top of the learning content hierarchy to prevail. A slight majority say textbooks are indispensable (45%) or becoming more essential (9%) in their discipline, but about three in 10 say textbooks are either becoming easier to replace (22%) or are unable to keep up with the field (7%).

- Only 14% of faculty expect the use of textbooks to grow in their discipline.

- Two-thirds of surveyed faculty say that the number of course materials they require per course has stayed about the same over the last five years. Fifteen percent say they assign somewhat more, and only 3% say far more. Studies by the Book Industry Study Group and others have found a long-term decline in the amount assigned.

- Stores: All this comes in a context of 68% of college stores reporting decreasing course materials dollar sales over the past five years, and another 9% flat sales.
Few faculty exclusively assign print or digital materials; mixing dominates

- About half of faculty (48%) say they assign some digital and some print, while another 28% leave the choice of format to students if both are available. Only 18% exclusively assign print formats, and only 6% exclusively digital.
- Vocational/technical fields have by far the highest print-only rate at 45%; performing arts, business, physical sciences, and fine arts range between 21% and 27%, and all others are below 20%.
- Life science (16%), computer science (13%), and engineering (10%) are the top digital-only disciplines; all others fall below 10%.
- **Students:** The top online or digital course materials students report using or being assigned in fall 2014 were homework assignments (74%), lecture notes/slides (63%), and quizzes/exams (61%). Only 15% report an online e-book/e-pack.
- **Stores:** Most stores think faculty show a slight (48%) or moderate (35%) interest in digital course materials. Only 10% see strong interest. Store rating of student interest follows a similar pattern.

E-textbook assignment varies widely by discipline and mode of instruction

- Overall 26% of faculty assign e-textbooks, though only 21% report that e-textbooks are among their most often used course materials formats.
- There are wide differences in e-textbook assignment by discipline: education is low (15%), math high (48%). Computer science, health, and physical science all have assignment rates of one-third or higher.
- Faculty who teach fully online courses are almost twice as likely (43%) as non-online instructors (23%) to assign e-textbooks. They do not, however, differ significantly in the assignment of print textbooks or any other course materials format we asked about.
- Nearly half of faculty respondents agree that digital course materials create new challenges for students who can’t afford technology.
  - Agreement varies by discipline, from 33% in engineering to 64% in humanities.
  - Variation is even wider in agreement that print materials are necessary to develop critical thinking skills in the disciplines. Among humanists, 59% agree, as do 57% of vocational/technical instructors. In contrast, only 17% of business and computer science instructors agree.
- Only 11% of faculty overall agree that assigning digital course materials decreases their teaching work load; half disagree.
- **Students:** Students aren’t enthusiastic about e-textbooks. E-textbooks alone are the preferred format of 7%, while e-textbooks bundled with additional digital content get 6% more. Together these add up to one-fourth of the corresponding print textbook rates. The top three reasons cited by students who prefer digital course materials are ease of taking them places, lower price, and environmentally friendliness.

II. WHERE FACULTY REFER STUDENTS TO ACQUIRE COURSE MATERIALS

Figure 2 - Where Faculty Refer Students to Acquire Course Materials (N=1038)
The top acquisition references are the college store and Amazon

- One in five faculty members does not advise students where to acquire materials. Of those that do, eight out of 10 say they refer students to the college store to acquire course materials (Figure 2).
- Among other sources, nearly half of faculty (48%) refer students to Amazon, 3% to Chegg, and 17% to other online retailers. Disciplines that refer to Amazon the most are vocational/technical fields (60%), humanities and fine arts (59%), and physical sciences (58%). Life sciences is the lowest (36%).
- Faculty who teach fully online courses do not differ significantly from non-online instructors in rates of advising students about where to obtain course materials, nor in rates of reference to the college store, Amazon, and Chegg.
- **Students:** NACS OnCampus Research® student purchase data roughly follows the faculty pattern of reference. Where 83% of faculty say they refer students to the bookstore, 66% of students say they purchase at the bookstore in-store, and 19% at the bookstore online (there is overlap in these). Forty-eight percent of students say they purchase through Amazon—exactly the percentage of faculty who refer there.
- **Stores:** One-third of stores say faculty adoptions through the store have decreased in the past five years, while about half report no change. Only 17% say they have increased.

Most faculty don’t make course materials available through the library

- Only four in 10 respondents say they typically make course materials available through the campus library. Top library-using disciplines are performing arts (60%), engineering (51%), and social sciences (50%). Lowest are vocational/technical fields (17%) and math (18%).
- Ladder faculty are more likely to use the library (44%) than are contractors (31%).

III. HOW FACULTY CHOOSE COURSE MATERIALS

![Figure 3 - Factors in Selecting Course Materials (N=1156)](image)

**Colleagues and quality drive selection of course materials**

- Among the most important factors considered when selecting or recommending course materials, overall content quality topped the list (Figure 3, 65%), with cost to students close behind (60%). These are the only factors that claimed majorities of respondents; no other factor exceeded 25%. (This question was only asked of faculty with at least minimal influence on selecting materials.)
• When asked to select the three most important influences on their selection of course materials, disciplinary colleagues were the top influencer (51%), “other” next at 38%, followed by student preference (25%) and a departmental selection committee (23%).

• Only 9% cite publisher representatives as influencers, but this varies widely by discipline, from 0% in math to 19% in business.

Selection autonomy varies by faculty status

• While 75% of ladder faculty say they select the materials assigned for their courses, only 37% of contractors do. Contractors are almost five times as likely to use a standard set of campus/department-selected course materials (24%) compared to ladder faculty (5%).

• Even among faculty who do not typically use standard course materials, 23% cite a departmental committee overseeing course materials selection as a top-three influencer. The rate ranges from 4% in engineering to 50% in math. Contractors who do not use standard materials are twice as likely to cite a course materials committee than are ladder faculty.

• Faculty selection autonomy is higher at four-year institutions than at two-year (73% instructor-selected versus 25%). This is partly due to the fact that two-year colleges make greater use of contract faculty who are less likely to have selection autonomy. Vocational/technical fields have the lowest disciplinary instructor-selected rate (31%), while engineering has the highest (84%).

• Top rates of campus/department-selected standard course materials are in math (32%), vocational/technical (28%), and computer science (26%).

• Most faculty (56%) expect greater standardization of general education course materials in the next five years, driven by greater use of adjuncts. There is little variation by discipline, but contract faculty are more likely (61%) to expect greater standardization than ladder faculty (53%).

• Faculty seem cautiously optimistic about retaining control over materials selection. Only a quarter overall think faculty input into course materials selection will diminish in five years. Far fewer ladder faculty believe their input will diminish (19% agree) than contract faculty (34%).

Faculty say they are aware of the cost of course materials

• Faculty do not see themselves as out of touch or unconcerned about the cost of course materials. Nine out of 10 of those with at least minimal influence on selection agree that they are aware of the cost of materials in courses they teach. Cost to students is the second most reported factor (Figure 3, 60%) considered when selecting course materials, after overall content quality (65%).

• Cost to students as a selection factor rates highest in education (70%), lowest in business (45%).

• Two-thirds of faculty with selection influence say comparative information about course materials cost would have a strong or very strong influence on their decisions. This slightly exceeds the 61% who say that information about course materials support of student learning would be a strong/very strong influence.

• At the same time, faculty do not report as pressing a crisis in student affordability as some might expect. Nearly 36% agree that “many” of their students are unable to afford required textbooks. Agreement ranges from 20% in computer science to 54% in fine arts, and is higher at two-year institutions (47%) than at four-year (31%).

• Faculty may not consider affordability as a crisis in part because they don’t hear a lot of complaints. A majority (57%) say that 10% or fewer of their students come to them with cost concerns, and seven out of 10 report 20% or fewer.

• Students: According to NACS’ OnCampus Research Student Watch™, 52% of students say 90-100% of their required course materials were covered by financial aid or private scholarships/grants. Another 20% report 51-89% coverage. Eighteen percent of students say the cost of course materials impacted how many courses they took in fall 2014. Of students not acquiring some required course materials, the top reasons are price (41%), didn’t want/need (33%), and that the professor said it wasn’t necessary (33%). When different sources of perceived non-need are combined, non-need becomes the larger reason for non-acquisition versus price.
Faculty have an arms-length relationship with the college store

- Only 8% of faculty describe their relationship with the college store as consultative; fewer than the 13% that say they have no relationship at all. The largest group says it's transactional (Figure 4, 46%), and another 33% place orders through their department. Education, vocational/technical fields, and business are the most likely disciplines to claim a consultative relationship; fine arts, life sciences, and computer science are most likely to have no relationship at all.

- This transactional orientation is supported by faculty perceptions of the most important capabilities of the college store: ability to stock course materials (60%), range of choices for students (53%), and service orientation toward students (36%). Knowledge about the cost of course materials is valued by one in five, but knowledge about course material alternatives or publishers both drew 10% or lower responses.

- Only 2% say they contact the college store before the academic term begins for advice on what course materials to select. One in three say “someone in my department” checks the availability, while 29% contact the store themselves to make sure materials are available.

- Given such stand-offish relationships and a tendency to favor colleagues’ advice and content quality when selecting materials, it’s not surprising that more faculty disagree (33%) than agree (21%) that the college store knows course materials options better than faculty. Likewise 46% disagree that the store is a useful resource for evaluating course materials options, while only 16% agree.

- Contract faculty (21%) are nearly twice as likely to agree that the store is a useful resource for evaluating learning content options than are ladder faculty (11%).

- Faculty who teach fully online courses are more likely to disagree that the store is a useful resource for evaluating course materials options, and that the store understands their needs. They are also more likely to agree that interacting with the store is a time-consuming process.

- **Stores:** Eight in 10 say they have “established relationships” or “had conversations” with faculty/department chairs regarding course materials. There is less connection, however, to more formal bodies: academic deans (69%), course materials committees (25%), and curriculum design (20%). The latter two rates are low in part because the bodies don’t exist everywhere. Where they do exist, 46% of stores have relationships with course materials committees; 25% with curriculum design.

- **Stores:** Store characterizations of how they work with faculty on course adoptions mainly reflect a service ethic. Most commonly, stores say they answer questions when approached by faculty (77%), they update faculty about current adoptions (68%), and meet with faculty when a question about a request arises (63%). There is a larger disconnect about course materials guidance. While only 16% of faculty say the store is a good resource for course materials evaluation, over a third of stores (37%) think faculty look to them as course materials experts and 21% as experts on student preferences.
The faculty relationship with the library is more consultative than with the store

- As we noted above, only four in 10 faculty say they make course materials available through the library. Among those who do, 47% describe the relationship as transactional (similar to the store's 46%), but 34% describe it as consultative, more than four times the rate for stores. Another 11% say they have little or no relationship with the library.

- Consistent with this, faculty using the library tend to see a bigger role for the library in evaluating course materials. The 43% who agree that the library is a good resource for evaluating materials is almost triple the 16% who see the store as such. There is no significant difference between disciplines, faculty status, or two-year and four-year on agreement. They also agree more that the library understands their needs (55% versus 29%).

- Among those who do use the library, 39% regard library staff as "knowledgeable colleagues" who help select course materials. However 45% respond that "there is a process for setting up reserves and that's about it."

- All this must be understood in the context that twice as many faculty use the store for course materials than use the library.

Faculty still want service from the library

- Despite some indications of a cozier relationship with the library than the store, faculty still place practical service items at the top of their most important library capabilities. Top items are service orientation toward students (75%) and faculty (53%), and willingness/ability to stock course materials (44%).

- Contractors are less likely to call faculty service orientation a top-three item, and more likely to choose knowledge of course materials in discipline and knowledge of course materials alternatives.

V. EMERGING PRACTICES: OERS, DIGITAL FORMATS, INSTITUTIONAL LICENSING

Figure 5 - Faculty Agreement about OERs “for the Kind of Courses I Teach...”

OERs are not yet mainstream, but faculty see potential

- One-third of faculty say they assign “openly available/free educational content on the web (OERs),” third among course material formats after print textbooks and digital non-textbook materials (Figure 1). It’s unclear whether these OERs are supplanting commercial materials. Highest OER assignment rates are in fine arts (42%), humanities (37%), and communications (36%). Math and business are lowest at 18% and 19% respectively; every other discipline reported 25% or higher.
• More than half of faculty answer “don’t know” as to whether OERs are being developed in their teaching field (Figure 5, 56%) or whether they would be a good resource (46%). Among those answering, those who think OERs would be a good resource (47%) far outnumbered those who do not (7%).

• Majorities of faculty in physical sciences, fine arts, and computer science agree that OERs would be a good resource.

• OER assigners are more likely than non-assigners to agree that OERs are/would be good resources for the kinds of courses they teach. They are also slightly more likely to agree that they are aware of course materials costs, though such agreement is high overall.

• Looking forward five years, one-third of faculty think that OERs will replace commercial textbooks in general education courses. OER assigners do not differ significantly from non-assigners in agreement. Among disciplines, humanities has the lowest expectation of OER replacement (27%), and business the highest (46%). Contract faculty are more likely to agree (40%) than are ladder faculty (31%).

Faculty see a digital future for course materials

• A little more than half of faculty (56%) expect most assigned course materials to be digital in their discipline in five years. Rates vary from 40% in the humanities to 79% in computer science. Business, communications, computer science, and engineering all exceed 60% expectation of majority-digital materials.

• Also in five years, 64% expect students to prefer digital versus printed formats. Differences between disciplines are not significant.

• Faculty seem to see potential in digital materials. Nearly half (48%) agree that their interactivity and adaptiveness can engage students more and support better learning outcomes. Most of the rest neither agree nor disagree. Humanities has the lowest mean agreement, computer science the highest.

• Students: Students feel mostly comfortable with digital course materials. Two-thirds are “extremely” or “fairly” comfortable with them, and only 13% are uncomfortable or don’t use them. Students show higher comfort, however, using devices like smartphones and computers.²

• Stores: One in four stores says their institution has a goal around course materials. Among these, the most common course materials format related to the goal is digital (61%), though print is close (54%). OERs, which lean toward digital formats, are related to the goal at 33%.

Faculty are mixed in expectations about licensing of course materials

• Asked if, in five years, “most institutions will license widely assigned course materials and students will pay a single fee” for it, 38% agreed and 43% disagreed. Another 19% answering “not applicable” may not have been familiar with the concept. Agreement with this statement is higher at two-year than at four-year institutions, higher among contract (47%) than ladder faculty (32%), and varies considerably among disciplines.

• Greatest agreement (49-51%) is in health, education, and computer science; lowest (17-28%) is in performing arts, humanities, and physical sciences.

• Stores: Of the one in four stores at an institution with course material goals, academic licensing is related to the goal at 24%.

² NACS OnCampus Research Student Watch™ Fall 2014 Report.
CONCLUSION: LOOKING FORWARD

Where is the faculty role in the learning content ecosystem headed? Any answer will be speculative by nature, but combining some clues from this report with larger forces shaping course materials, we suggest that faculty practices will evolve in the following ways:

- **Rising cost sensitivity.** Faculty have come in for a share of the blame for skyrocketing textbook prices under the theory that a system in which faculty “shop” and students buy provides no incentives to contain costs. In truth, we take the strong contrary finding of high cost awareness reported in this study with a grain of salt. Positive self-assessments, after all, don’t cost faculty anything, while switching from a familiar textbook to a cheaper new one imposes real costs in time and effort. Yet, the textbook price controversy has become a potent force in recent years, and low- and zero-cost alternatives are growing. Our respondents seem at least interested in, and many are positive about, the OER movement.
  - For political, idealistic, and practical reasons, we think faculty will become more actively price-conscious when adopting learning materials.

- **Growing acceptance of digital formats.** So far, the digital revolution in course materials has inspired more curiosity than adoption. Book culture has a deep hold on the academic psyche and has been maturing for 500 years. Yet e-textbook assignment and digital supplemental materials have strong footholds in many disciplines, and faculty—with resignation or anticipation is hard to say—mostly believe that course materials are trending toward digital.
  - The breakout for adoption of digital could come as institutional hunger for learning outcomes information merges with adaptive and analytical features in emerging digital content. College stores have an opportunity to “be the expert” and to provide support across the collection of stakeholders.

- **Standardization of the assignment process.** Adjunctification, digitization, and student avoidance all feed the centralization of course materials decision-making. We believe that the optimism our respondents profess about future faculty input on selection needs to be placed in the context of the “college cost crisis” and the growing complexity of course materials. The autonomous artisan-scholar crafting her own course will surely still predominate at elite institutions and in upper-division and graduate studies. However, we anticipate something different in the rest of the academy.
  - The materials adoption process for mass-enrollment, lower division courses will likely evolve into a system of faculty advisory committees combined with heavy administrative influence.

- **Decline of the college store default.** We found little animus toward the college store in our study but also little sign of loyalty to it. Half of faculty refer students to Amazon, and we suspect (though we did not ask) that Amazon is the default bookstore for many faculty members’ personal book purchases. Campus boundaries no longer define a self-contained universe, and online purchase is normative.
  - Faculty have little power to stop students from shopping wherever they choose, but have influence when it comes to learning content and course materials.

- **Content creation teams.** Just as a more complex course materials environment will promote team and institutional selection decisions over individual ones, faculty creating new digital course content will need access to a broader range of skills than is found in traditional publishing.
  - Faculty will work more with designers, pedagogy experts, programmers, and other experts to create the learning content of the future.

- **Integration with broader learning services.** Hoping to improve retention and degree completion rates, many institutions are experimenting with new learning support services that help students succeed. Advising, tutoring, motivational coaching, simplified curricula, early alert systems, and many other practices are being introduced or re-designed to improve student performance. In this emerging “success culture,” faculty will be more accountable for student outcomes.
  - Increased accountability for student success could affect faculty content adoption decisions by introducing data-driven course materials selection criteria and by widening the sphere of resources faculty recommend and consume.
Critical Questions for College Stores

1. What course materials selection process(es) is used on your campus? Are you communicating with, and offering support services to, the appropriate audience for each adoption?

2. What are the pace and driver(s) of the transition to digital on your campus? Are you part of the discussions and planning process for your campus’ move to digital course materials?

3. What initiatives does/can your store implement to provide greater service and “solutions” to faculty related to course materials, to generally enhance the relationship between store and faculty, and to encourage faculty recommendation of the college store?

ABOUT THE NACS FACULTY SURVEY

The NACS faculty survey was commissioned by the NACS Foundation and developed by Richard N. Katz & Associates in cooperation with NACS and OnCampus Research®. The survey was sent to faculty at NACS member institutions in fall 2014. Responses were received from 1,388 faculty members at 14 institutions. The largest response count was from doctoral institutions (670), followed by associate’s (467), master’s (210), and baccalaureate institutions (41). See Table 1 for response counts by discipline, and Figure 6 for composition by employment status. Analysis was conducted by Richard N. Katz & Associates in early 2015.

Table 1 - Respondents by Discipline

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Figure 6 - Respondent Employment Status