



To: Provosts

From: Jonathan Lashley, Deputy Chief Academic Officer

Cc: Registrars; Library Deans; relevant institutional stakeholders and committees

Date: July 31, 2026

Re: New Guidance for Policy III.U. Instructional Material Access and Affordability

I am writing to clarify changes in practice, confirm what remains the same, and offer guidance on what institutions should do next toward implementing the revised Board Policy III.U. Ultimately, the updated policy preserves the plan-based approach institutions have built since 2022, streamlines planning and reporting, and protects the substantial progress your campuses have already made in course marking, zero-cost degree pathways, faculty development, and other strategies that increase access to required instructional materials. I've attached a checklist to aid your implementation of new standards by **March 31, 2027**.

What Changed from the Original Policy

- **Cost:** The policy now defines "cost" as the calculated total price an institution **may guarantee** to students for instructional materials, including pricing negotiated with a provider (III.U.2.c), replacing list price for a faculty-preferred format. Course marking designations should map to the guaranteed price **even when a lower-priced unbundled option exists**.
- **Automatic charges:** The requirements now cover the **course, program, and institutional levels** (III.U.2.b) and cover any arrangement that charges students for instructional materials alongside tuition and fees.
- **Course marking:** Course marking strategies must now indicate **cost, delivery, and any automatic charges at time of registration** (III.U.3.f). The new "**Affordable**" designation applies only to zero, very-low-cost, and low-cost materials (III.U.2.d).
- **Institutional plans:** The policy replaces the previously required and optional tiers with a single, consolidated set of required elements (III.U.3.a–h). Section 3.e now names recognition of faculty work to create, adapt, and share open educational resources in tenure and promotion as a required element.
- **Automatic charge inventory:** Plans must list the courses and programs that use automatic charges, identify whether students may opt in or out, and describe how

students access alternative, comparable-quality materials if a student opts out. This information should be collected at the level at which the institution assesses the charge, and that level should be identified in the report..

- **Administering automatic charges:** Going forward, institutions must communicate costs clearly, make opt-in and opt-out information available **for at least two full weeks after each course begins**, ensure their programs do not disincentivize faculty from adopting affordable materials, and include the student data provisions of III.U.4.c in provider contracts.
- **Curricular transparency:** Institutions must publicly post accurate, current course descriptions **one week before** a course begins and make current syllabi available in the learning management system by the **first day** of class (III.U.5.b–c). All institutions are already in compliance with section 5.a.

What Institutions Should Do Next

- **Review your existing plan:** Review your plan against III.U.3.f and III.U.3.g, updating content as needed (III.U.3.h). Send the updated version of your institution's plan to Liza Long (llong@edu.idaho.gov) if you indeed make changes before **March 31, 2027**. We do not expect a rewrite; an updated version of your existing plan will suffice.
- **Apply Section 4 going forward:** Do not reopen contracts currently in force for automatic charge administration; incorporate the provisions at renewal, extension, or execution of new agreements with third parties. Where existing terms already permit compliance, align your communication practices now. Identify affected agreements and their renewal dates in the annual report.
- **Prepare for annual reporting:** The annual report will follow the scope and format of the *Open Education in Idaho* report presented to the Board in June: data, stories, and student quotes covering open pedagogy, zero-cost degree pathways, library strategies, faculty development, incentive policies, and course marking. Institutions will also include an automatic charge list (described above). The Board Office is developing templates and timelines for reporting, and we will circulate them for comment before finalizing.
- **Keep your goals.** The policy no longer requires measurable goals for common-indexed and dual credit courses, but we encourage institutions to retain them as ongoing plan elements. Removing a requirement does not suggest removing the practice.

Relevant Contacts for Policy Implementation

- Send plans and related reporting to Liza Long, llong@edu.idaho.gov
- Direct questions about the policy and this guidance memo to Jonathan Lashley, jlashley@edu.idaho.gov

Attachment: III.U Compliance Checklist

Definitions and cost

- ☐ Recalculate course marking designations based on guaranteed or negotiated price rather than publisher list price (III.U.2.c)
- ☐ Exclude tools, equipment, and supplies from instructional material counts (III.U.2.a)
- ☐ Implement all five designations; apply "Affordable" only to zero, very low, and low cost materials (III.U.2.d)

Plan

- ☐ Review your plan against required elements III.U.3.a–h and send the current version to Liza Long (llong@edu.idaho.gov)
- ☐ Mark cost, delivery, and automatic charges at time of registration (III.U.3.f)
- ☐ Assemble the automatic charge list: courses and programs, opt-in or opt-out, how students access alternative comparable-quality materials (III.U.3.g)
- ☐ Name a reporting lead who certifies the list at your institution for any follow-up
- ☐ Address academic freedom, referencing III.B (III.U.3.b)
- ☐ Address faculty creation, adaptation, and sharing of open educational resources in incentive or tenure and promotion practices (III.U.3.e)
- ☐ Submit any updated institutional plans to Liza Long as needed

Automatic charges

- ☐ Communicate costs and participation options clearly to students (III.U.4.a)
- ☐ Make opt-in and opt-out information available early and for at least two full weeks after each course begins (III.U.4.a)
- ☐ Review your program for faculty disincentives to adopting affordable materials (III.U.4.b)
- ☐ Inventory third-party provider contracts and renewal dates
- ☐ Add the III.U.4.c student data provisions at renewal, extension, or new execution — restrict use of student data as specified in the policy

Curricular transparency

- ☐ Post current public course descriptions one week before each course begins (III.U.5.b)
- ☐ Make current syllabi available in the learning management system by the first day (III.U.5.c)

Reporting

- ☐ Gather data, stories, and student quotes across the six focus areas
- ☐ Include the automatic charge list
- ☐ Submit an annual report to Liza Long **by March 31** each year