Report to the Montana Board of Regents, the Commissioner of Higher Education, and members of the higher education community on textbook affordability.
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Forward

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Acknowledgments
Montana is grateful to the statewide programs that have blazed the way before us. The committee created this report and the Montana OER program inspired by the efforts and previous reports by our neighboring states of Colorado, Oregon, Washington, as well as Ohio, British Columbia and others within the open education community.

The program also acknowledges with gratitude the advocacy and work by Pamela Benjamin and Kenning Arlitsch as well as the investment and support provided by the Montana Board of Regents, the Commissioner of Higher Education, and the staff of the Commissioner’s office to start this work. Without the effort and commitment of these individuals, the program and all of those who benefit from it would not be here. The forward thinking by the Board of Regents to collaborate with TRAILS and its unique collective of public, tribal, and private institutions sets this program apart from others in the United States.
Executive Summary

In recognition of the radically escalating cost of traditional textbooks and a commitment to making higher education in Montana more affordable, the Montana Open Educational Resources (OER) program was created. Open Educational Resources are free openly licensed educational materials such as textbooks and other course materials that dramatically decrease course costs for students.

The Montana Open Educational Resources program is a collaboration between the Treasure State Academic Information & Library Services (TRAILS) and the Montana University System (MUS) Office of the Commissioner of Higher Education (OCHE). In January of 2019, the Montana University System Board of Regents allocated funding to support OER efforts across the Montana University System. Building on the ongoing effort of individual campuses and the work of the TRAILS OER Committee, the initiative was tasked with:

- Assessing the impact of high textbook costs for students;
- Measuring cost savings for students when faculty adopt open course textbooks and materials;
- Assessing the cultural change in knowledge about OER, support available for adopting OER, and OER’s efficacy in the classroom; and
- Developing and assessing the effectiveness of faculty grant opportunities in promoting a broader culture of OER adoption.

This report outlines the statewide OER program, its goals, and accomplishments in its first year, from January 2019 through June 2020. In the first year of the initiative, the program focused on developing strategic objectives, key metrics, and program activities aligned with the overall goals of the initiative. In the initial months of the program, the statewide TRAILS OER Committee established campus and community partners, administered a statewide survey of faculty and students to assess knowledge and use of OER, and hired a coordinator to develop and implement the initiative. Under the leadership of the Coordinator and in partnership with the TRAILS OER Committee and campuses across the state, the initiative also successfully launched a faculty grant program, held two all-day trainings for campus leaders in OER, and hosted many events for faculty, librarians, and administrators.

Despite the expected challenges of launching a state-wide program as well as the unexpected challenges of doing so amidst the significant disruptions caused by COVID-19 and the additional strain on momentum and resources this disruption caused, the TRAILS MUS OER initiative met every goal for year one. The initiative has increased awareness of the value of OER, promoted adoption of OER across the state, and has laid the foundation for data infrastructure that will help build capacity to grow the program in the future. All of this has resulted in an early return on initial investment, all realized as savings for Montana University System students.

“Dear Board of Regents: Thank you for starting this program. We need more of it. I had to drop 3 classes last year because I couldn’t afford the textbooks. That’s not okay.”
~Montana student

“Dear MSU: As a nursing student, my textbook costs are enormous. Faculty work hard to keep those costs down and they need your support.”
~MSU student
Key Activities

**Faculty Grants**

The initiative ran two grant cycles to support faculty in reviewing, adopting, and authoring OER. The program prioritized grant awards for faculty using OER in high-enrollment, frequently-taught courses that are part of the MUS Common Course Numbering system.

**Survey**

The program conducted a system-wide survey to assess baseline knowledge and use of OER among students and faculty. The survey also assessed the impact of the high-cost of textbooks on MUS students’ academic performance. The survey informed priority activities for the initiative.

**Trainings & Workshops**

As part of the initiative’s push to change the culture of textbook use and knowledge about and value of OER, the initiative hosted dozens of workshops, courses, and trainings at MUS and TRAILS campuses across Montana.

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Key Outcomes

<table>
<thead>
<tr>
<th>Grants awarded to the MUS</th>
<th>Students saved money by using at least one grant-funded OER textbook in FY20</th>
<th>Faculty, administrators, and support staff attended MUS TRAILS OER trainings and workshops</th>
<th>Student Savings from use of grant-supported OER</th>
</tr>
</thead>
<tbody>
<tr>
<td>91</td>
<td>786</td>
<td>324</td>
<td>$142,710</td>
</tr>
</tbody>
</table>

*Grant investment resulted in $142,710 in savings the first year of OER adoption. Projected savings in year two of OER adoption is $536,735, and projected savings in year three is $941,788.24. Student savings in Year One of OER adoptions is calculated based on actual enrollment. Projected student savings in years two and three is calculated based on average course sections and enrollment.*
Key Priorities for Year Two

As the TRAILS MUS OER initiative moves into its second year, the program seeks to remain adaptive to the current climate of higher education and to leverage opportunities to continue to provide innovative approaches to college affordability, access, and success.

<table>
<thead>
<tr>
<th>Continue outreach and education</th>
<th>Implement another round of faculty grants</th>
<th>Develop data infrastructure and design plan</th>
</tr>
</thead>
<tbody>
<tr>
<td>to support increased awareness of the value of Open Educational Resources.</td>
<td>supporting OER use in high-enrollment, frequently taught, commonly-numbered courses.</td>
<td>for developing a system-wide low-cost or no-cost textbook indicator for course registration.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Develop institutional guidelines</th>
<th>Develop recommendations</th>
<th>Continue to seek funding opportunities</th>
</tr>
</thead>
<tbody>
<tr>
<td>for ZTC degree mapping using MSUB Business Marketing degree as pilot.</td>
<td>for how the MUS can meet compliance requirements for the federal Affordable College Textbook Act (H.R.2107/S.1036) and the Higher Education Opportunities Act (HEOA).</td>
<td>to support increased use of open educational resources at MUS and TRAILS institutions.</td>
</tr>
</tbody>
</table>
Introduction

The MUS and TRAILS Partnership

The Montana University System and the TRAILS Consortium have long been committed to supporting and advancing innovative strategies to address the rising cost of textbooks and subsequent consequences on college affordability, access, and academic achievement. Given the high cost of traditionally published textbooks and the relationship between textbook cost and academic outcomes, reducing the cost of textbooks has the potential to have significant impact on affordability and student success.

Driven by this shared recognition, the MUS and TRAILS partnered in the Fall of 2018 to launch a system-wide Open Educational Resources initiative. Starting in January 2019, the Montana Board of Regents created and funded the initiative, to be carried out as a partnership between the MUS and TRAILS. With TRAILS’s in-depth expertise and experience in open education and with the support and leadership within the MUS, the partnership was well-positioned to coordinate a statewide OER initiative for Montana’s higher education community.

The Montana University System is comprised of sixteen campuses that serve approximately 42,000 students across the state. As one of its primary strategic objectives, the MUS is committed to making public higher education more affordable. As high textbook costs are a significant part of the total cost of attendance and can be a barrier to access and success, particularly low-income students, the MUS is committed to supporting Open Educational Resources as an important part of its strategy to make Montana public higher education affordable.

TRAILS is Montana’s statewide consortium of academic libraries. Members include the 16 public institutions and community colleges within the Montana University System (MUS), Montana’s 7 tribal colleges, and 3 private institutions. This 27 campus partners comprise a unique collaboration that works to ensure all Montana students have equal access to high quality library and educational resources. As TRAILS directly works with academic publishers to provide library resources to its members, addressing the rising cost of academic materials has always been a priority.

In the first year, the Montana Board of Regents committed nearly $275,000 to support the initiative. These funds serve to both create the program and provide grant funding for faculty within the MUS system. Support and program building funds were allocated to the creation of a statewide coordinator position, subscription to open educational resources networks, and operational costs to conduct workshops and trainings for faculty, administrators, and support staff across the state. Grant funds offered to eligible MUS faculty were directed to grow the program and meet MUS objectives.* Building on the success of the first year, the Montana Board of Regents committed just over $125,000 to support the initiative in its second year.

*Though TRAILS includes institutions that are not part of the Montana University System, grant funding dedicated to this initiative was used only to support MUS institutions.
Open Educational Resources: Advancing Affordability, Access, and Achievement

Textbook costs in the United States rose over 87% in the last decade alone. According to The College Board, the average student spends $1,200 on course textbooks and materials every year. This dramatic increase has added significantly to the cost of college, has created new financial barriers that limit access to higher education, and has exacerbated achievement gaps for students, particularly those who are already underserved (US Bureau of Labor Statistics).

![Increase in college textbook prices over 40 years](Image)

What’s more, unaffordable textbook costs have negative impacts on student academic performance. Over 60% of students enrolled in higher education do not purchase required course materials, even though nearly all students report that not purchasing course materials will have negative impacts on their academic performance. When textbook costs are too high for students to afford, they often take fewer courses and earn poorer grades (2016, 2018, Jensen).

Open Educational Resources (OER) provide a solution to these challenges. Open Educational Resources are textbooks and course materials that are openly licensed and available for free or low-cost. Open education is an innovative approach to increasing and improving educational access and effectiveness worldwide through open sharing of teaching and learning resources, tools, practices, and materials (Open Education Global). Open education encompasses the creation, adaptation, and adoption of open educational resources (OER).

Transitioning from use of traditionally published textbooks to use of Open Educational Resources reduces the cost of textbooks and course materials and removes associated barriers to student success and

“Open educational resources are freely available, high-quality learning materials that can be downloaded, edited, and shared to better serve all students.”

~Hewlett Foundation
academic achievement. If each student enrolled in the Montana University System were to take one class with an open textbook a year, MUS students would save a total of $4.9 million annually.

What’s more, use of open educational resources has been shown to significantly improve academic outcomes, including lower drop/fail/withdraw (DFW) rates and higher grades (University of Georgia Impact of OER on Various Student Success Metrics PDF). These benefits were most significant for students eligible for Pell Grants.

While addressing the cost of required academic course materials (e.g. textbooks) is critical, maintaining and improving the quality of education is equally critical for student success. Open education supports affordability and recruitment efforts; yet a valuable component of the field is the ability of these resources to support educational outcomes, from success and completion rates in the classroom to overall program and degree retention rates.

Program Planning

The MUS TRAILS OER Initiative was developed in two phases. First, TRAILS administered a survey to assess knowledge and use of OER as well as the impact of textbook costs on students. Second, various stakeholders including the statewide coordinator, OCHE and TRAILS representatives, and the OER Committee participated in the development of strategic objectives and activities that would help create the foundation for a sustainable program and continue to promote growth of OER use far into the future.

Survey

In the spring of 2019, a survey of faculty and students was conducted by library faculty at MSU Bozeman. This baseline survey provided the OER Committee with an overall assessment of the awareness of open educational resources and usage amongst faculty as well as challenges students were facing with textbook affordability. Thirteen of the 24 institutions provided responses. While the method of distribution for each institution varied among campuses, approximately 10% of the student population at each campus and randomly selected faculty received the survey. A total of 1,164 responses were received.
The survey gathered information about students’ financial situation, basic needs issues, textbook buying practices, impact of textbooks on academic performance, and faculty and student prior knowledge and use of open educational resources.

**Survey Findings**

The responses collected in the survey are reflective of national trends in textbook affordability ([USPIRG](https://www.uspirg.org)). Students surveyed reported that they already experience financial insecurity and that high-cost textbooks exacerbate this challenge, which also negatively impacts their academic performance. This survey showed students in Montana are in great need of affordable solutions that better meet their learning needs.

In addition to surveying students and the impact of high-cost textbooks, the survey also gathered data on faculty opinion and use of open educational resources. Though a significant percentage of faculty surveyed knew about OER (66.5%), very few are actually using OER, just 5.6%. The reasons for not utilizing OER stem from common misperceptions of lack of quality, comfort with their current materials, and integrations into course management/homework systems, as well as a hesitancy to make changes to their curriculum.

The survey results informed the TRAILS OER Committee that the program needed to focus on broad educational outreach. Both the minimal number of faculty using OER as well as the misconceptions of the potential and impact of OER and other affordable options led to major efforts spent on workshops and trainings during the summer and fall. Grants for the creation and adoption of OER (outlined in the appendix) were introduced in the Fall of 2019. ([Full Survey](https://www.uspirg.org))

**Key Findings**

- Students report experiencing financial insecurity. Students report visiting the food bank, using reduced cost housing, work study, veterans’ benefits, taking money from retirement funds, enrolling in Medicaid/SNAP, receiving scholarships, receiving financial assistance from family members, donating plasma, and working two jobs while attending college in order to afford their education.
- 27% of student surveyed had taken out student loans.
- 17.4% of student surveyed were Pell grant recipients.
• Most students reported spending between $100 and $399 on course materials for the Spring 2019 semester.
• When it comes to deciding which materials to use, faculty report a number of factors including subject matter (16.8%), prior use (18.5%), peer-review (8%), and cost to the student (14%).

The survey will be administered across the system every two years to track changes in knowledge of OER, use of OER in courses, and impact of OER and traditionally published textbooks on students.

**Strategic Objectives & Strategic Activities**

Based on the survey findings, the statewide coordinator worked with stakeholders from TRAILS, the Office of the Commissioner of Higher Education, and the TRAILS OER Committee to develop strategic objectives and strategic activities aimed at:

• Making open educational resources more available to students;
• Educating faculty on the alignment of OER with quality instruction, rigorous scholarship, and academic freedom;
• Supporting faculty to adopt OER;
• Providing support to administrators on their role in promoting and supporting OER.

After the initial round of grants were awarded in Spring 2019 and the survey results were collected, the program prioritized education and outreach for the first half of the year, focusing more on faculty education and broader campus awareness than on grant awards.

**Strategic Mission**

Through a partnership that draws on the leadership of the Montana University System and the collaborative power of the TRAILS consortium, the MUS TRAILS OER Initiative works to create an impactful, sustainable program that engages institutional, system, and academic communities in pursuit of affordable, high-quality higher education for all students in the Montana University System.
MUS TRAILS OER STRATEGIC OBJECTIVES

**Affordability** With the cost of college textbooks and course materials increasing over 1000% in recent decades, textbook and course materials have become cost-prohibitive. The MUS TRAILS OER initiative prioritizes reducing the cost of textbooks and course materials for students, focusing on supporting change in high enrollment courses in addition to overall impact.

**Excellence & Innovation in Education** The MUS TRAILS OER initiative will work to advance excellence and innovation in education by providing support to faculty in developing intentional pedagogical strategies using open educational resources that are high-quality and relevant to learning experiences. Engaged student learning and positive student outcomes are at the center of professional development support for this initiative.

**Culture Change** The MUS TRAILS OER initiative works to increase awareness of the impacts of high textbook and course material costs and to cultivate commitment to reducing textbook and course materials cost among students, faculty, staff, and campus and system leadership. This initiative will support cultural change through connecting and supporting institutional programs and practices, as well as by aligning state and institutional policies and practices. By measuring awareness, impact, and celebrating successes, the OER program will champion institutional as well as statewide cultural change.

**Access, Success, Equity** The high cost of textbooks exacerbates achievement gaps in higher education by creating barriers to accessing high-quality, affordable educational materials. The MUS TRAILS OER initiative works to eliminate barriers to access and student success by making high-quality, affordable textbooks available for all Montana higher education students.

**Community** The MUS TRAILS OER initiative provides a platform that engages faculty across MUS institutions and other higher education institutions in the state, nation, and the world. This initiative is committed to supporting instructors in developing open materials that reflect the varied nature of course offerings, including exceptional and unique courses and programs found in Montana. This initiative places Montana culture and place-based knowledge at the center of state, national, and international open educational resources.
Program Activities

The five strategic objectives define and drive every activity of the program (Affordability; Excellence and Innovation in Education; Culture Change; Access, Success, and Equity; Community). These are the values with which the program’s strategic plan was developed. Additionally, the program respects the unique cultures of each campus, individual campus OER efforts, and the academic freedom of individuals. The long-term goal is to aid each campus within the TRAILS consortium to create its own successful textbook affordability initiative. Through education, peer-to-peer connections, collaboration with the broader open community, and grant funding, this program offers the needed support for institutions to build programs within their current capacities.

Workshops & Trainings

Through membership in the Open Education Network (OEN), the program hosted two all-day trainings led by the OEN. These trainings, held in March 2019 at Montana State University and in September 2019 at the University of Montana, provided good foundational knowledge of open educational resources as well as how to recruit and train others to lead campus initiatives. Fourteen TRAILS institutions and members of the Office of the Commissioner of Higher Education participated in the trainings.

The OER Coordinator also held trainings for faculty, instructional support staff, administrators, and others on campuses and virtually. This consisted of textbook review workshops, introductory trainings for campus stakeholders such as bookstores and administrators, and webinars that explored more in-depth aspects of open education such as open pedagogy or best practices in student assessment with OER.

Outreach events for students and the campus community were also held on multiple campuses including holding informational sessions for student organizations, tabling informational booths at campus fairs and convocation events, as well as meetings with different campus partners to identify best paths for individual campus initiatives. TRAILS developed a partnership with MONT PIRG, the Montana chapter of US PIRG. Their national advocacy for textbook affordability and open educational resources has helped inform and guide federal and state government policies and funding. This partnership led to student-initiated activities and advocacy to educate students about OER and create student-led initiatives to promote adoption of OER to faculty. These kinds of grassroots efforts from all levels of the campus community are a major priority for the initiative and vitally important for creating a sustainable program.

This year has demonstrated that the most effective way to provide education and awareness to faculty is through the Open Education Network’s Textbook Review workshops.
While changing textbook affordability for Montana students is a driving element of this program, the quality of education for those students is also a priority. To that end, the Montana OER program has provided education in instructional design, universal design, accessibility standards, and quality pedagogical practices through the online instructional design course created by the OER Coordinator. For one section of this course, Montana faculty were able to participate and collaborate with faculty from Colorado, Oregon, and Washington who joined the course. Feedback from participants indicates that the instruction and tools provided both enable and inspire faculty to move more of their courses to open content. Three members of the business department at MSU Billings took the course. These instructors found the class so helpful that they committed to using the methods they learned to transition all required courses in their program to OER.

Achievements

- 11 different live introductory trainings on were held on seven different TRAILS campuses.
- 24 open textbook reviews workshops were delivered.
- 4 webinars on specific elements of open education were conducted.
- New resources for Montana students & faculty, including K12 colleagues, were publicly shared and available on the program website in timely responsiveness to the COVID-19 crisis.
- 14 virtual support forums were provided to aid faculty in their online course transitions.
- New learning opportunities and professional development webinars have been developed to continue education while increasing learning opportunities in online course design, technology uses with OER, and quality pedagogical practices in online instruction.
- Three sections of this course were held during the fiscal year with over 50 participants from 7 MUS institutions.

Grant Program

The MUS TRAILS OER grant program was developed to support Montana University System faculty in adopting OER or other open access resources such as library resources. The grant program was designed to be the foundation of two important objectives of the program: realize student savings early in the program and build a culture of awareness and support for OER adoption. While monetary awards do not cover the time and effort required of faculty to transition and redesign their courses, grant funds are intended to support faculty in adopting OER in place of costly traditionally published textbooks.
To maximize savings for students, the grant program prioritized funding to support high-enrollment, frequently taught courses that are commonly numbered across the system. In responding to higher education access needs, the grant program also sought to fund OER adoption in dual enrollment courses. In maintaining a commitment to building a culture of OER knowledge and use across the state, the grant program accepted and awarded grants to faculty across the MUS. The Committee also planned priorities for the second year of program grants. To accomplish these goals, the grant portion of the program offered textbook review stipends, education stipends, and grant awards.

**FY19/FY20 Grant Goals**

**Goal 1:** Attain wide-reaching faculty participation; create faculty champions for the program.

**Goal 2:** Support creation of unique and diverse new open course materials that will garner peer interest from other Montana faculty as well as bring national attention to the caliber of the program.

**Goal 3:** Prioritize funding for high enrollment courses to maximize impact of the program.

**FY21 Grant Goals**

**Goal 1:** Utilize faculty champions for peer-to-peer advocacy and outreach through marketing and promotion of 1st year awards.

**Goal 2:** Create funding opportunities for the top 50 highest enrollment courses.

**Goal 3:** Prioritize funding and outreach for lower division, CTE, and dual credit courses.

**Goal 4:** Seek funding partners to create collaborative grants that connect TRAILS’ public, tribal, and private institutions.

**Review & Educational Stipends**

Through the membership with the Open Education Network, textbook review workshops were held to provide trainings that introduced and educated participants about the textbook affordability issues facing higher education as well as the solution that open education provides. Faculty participants were invited to review a textbook in their field of study. These reviews, standard practice in educational publications, serve to introduce faculty to quality open texts while furthering the professional scholarship in the open field. Textbook Review stipends are one-time awards given to faculty who choose to write a review. This method has proved to be the simplest and most effective way achieve adoption of OER. Of the total number of faculty who participated in Textbook Review workshops, only 20% chose to complete a textbook review, but 87% of textbook reviewers chose to adopt an open textbook for at least one course they teach. Though not all faculty wrote a review after attending a workshop, 42% of attendees either adopted a text, are pursuing adoption, or are pursuing other grant opportunities to integrate open materials into a course.

Educational stipends were offered to faculty who completed the online instruction design course offered through this program. After the first cohort of faculty completed the course, the overall
feedback was that the value of the course was significant and that the stipends were unnecessary. Educational stipends for this will not be offered to upcoming cohorts.

**Grant Cycles**
The OER Committee hosted a call for proposals in spring 2019, winter 2020, and planned for another cycle in spring 2020, which was disrupted by COVID-19. Grants supported four main activities: adoption of existing OER texts, maintenance or updating of currently in use OER texts, development of ancillary materials such as quizzes or lab notes, and creation of new OER textbooks (Grant Awards).

Grant recipients must teach with open materials within a fiscal year. The program tracks use of OER materials throughout the grant year and beyond. Adoptions are shared on the TRAILS OER database. All new materials created through the program are published by the program to the Open Textbook Library as well as other OER repositories.

Faculty participants receive support from the Coordinator in addition to the support their campus library and other instructional support services provide. They are offered the instructional design course to assist them in the transition. The Coordinator also provides peer connections across institutions to maximize quality and impact for each adoption. Each awardee participates in assessment surveys and data sharing each semester.

**Achievements**
Respecting the time needed to change a course, the emergency transition to online instruction that shifted faculty priorities, and that the majority of grant awards were not administered until Spring 2020, the number of courses that were transitioned within year one will be much lower than the number of awards given. Based upon the number of Spring 2019 awards given in combination with industry standards for 1st year OER initiatives, the benchmark goal for of courses utilizing OER was 10. Due to the hard work of the initiative in education and outreach, 30 different MUS courses were transitioned to OER during FY20. 74 stipends and grants were awarded to MUS faculty. Each award will garner a course transition and additional student savings in FY21.

In addition to course changes, the program is publishing 6 new open textbooks as well as ancillary materials for 4 more courses as a result of the grant awards.

**Culture & Community**
As part of the initiative’s commitment to building a sustainable culture of textbook affordability, the program actively works to build local, state, national, and global networks to support OER. As part of this effort, TRAILS became a consortial member of the Open Education Network (OEN), Open Education Global (OEG), and the Community College Consortium for Open Educational Resources (CCCOER). These memberships allow the MUS TRAILS OER initiative to support all faculty and institutions in their diverse and unique educational needs.

The Open Textbook Network membership gives individuals and institutions within TRAILS access to an active open education community. The OEN held two large all-day trainings in Montana. Their virtual trainings and professional development opportunities throughout the year are accessible to all TRAILS institutions. The OEN provides the OER program with training materials and access to a tracking database to host and trace all Textbook Review workshops and subsequent faculty adoptions. The Open
Textbook Library will host all publications from the Montana OER program, making them publicly available to institutions worldwide as well as providing a quality peer-review platform for each publication. This membership has been valuable in developing a strong state-wide program.

Recognizing that faculty are essential to growing textbook affordability programs and have needs that are very discipline/subject/course-level specific, it is equally imperative to provide faculty connections with others in their fields. Campus support services are not trained or equipped to help faculty research and identify OER for every course. Members in these open education organizations allows individuals system-wide to connect and find support from colleagues teaching like courses nationwide. All of this enables community building across the state and facilitates the culture connection and sharing that is the core of open education.

**Achievements**

Building partnerships and networks that connect Montana University System and TRAILS institutions Membership with CCCOER and OE Global is an important part of changing the culture around textbook affordability in Montana and will be essential to making lasting change. These partnership and community building give individuals on every campus access to collaboration opportunities, professional development and training opportunities, and the ability to share the great work they are doing in Montana with their colleagues across the state and beyond. For example, 7 individuals from 5 institutions received in-depth training in open education, open publishing, and OER Librarianship through the OEN Membership. In addition, a statewide database organized by MUS common course number was created to connect faculty across the state with OER already being used in their courses.

**COVID-19 Impact**

As with all other aspects of campus life, the work of the OER initiative was disrupted by COVID-19. In recognition that faculty and staff were responding to the significant demand of transitioning academic and campus life to remote environments, the initiative altered its spring plans. These alterations included:

- Postponing a Statewide Virtual OER conference with local and international speakers, including sessions on open pedagogy, OER in CTE courses, dual credit programs in OER, accessibility in OER, and more.
- Transitioning plans for an in-person full-day OER program at UM Western campus (including a faculty forum presentation) to a virtual format.
- Postponing the spring 2020 grant cycle.

Despite these challenges and disruptions, there are new opportunities for OER in that faculty are looking for tools and strategies for virtual teaching and learning. The program is responsively shifting meet faculty needs.
University of Montana faculty who made the switch to OER this year shared:

“In the past, often students were not able to access the book at the beginning of the term because of issues with financial aid or ordering of the physical books such as delays in mailing, etc. We did not have any delays for any students at the beginning of the term. Students were able to immediately access the materials that they needed. The OER materials were found in places that students should visit in the future when they have questions regarding their clients in speech therapy; for example, the American Speech-Language-Hearing Association houses current best-evidence in the field. Students were made familiar with these resources that they hopefully will return to in the future.”

“My experience in using this OER has been fantastic. I loved that I could link to each specific chapter in the textbook on Moodle and that the OER textbook was so easy to use. This was overall the best book that I could find for my class, OER or not, and I’m delighted that I had the opportunity to use it.”

“The switch to OERs made the beginning of term flow much more smoothly. Usually I spend a considerable amount of time helping students get up-and-running with the e-book, which requires on-line registration, payment, access through Moodle, etc.”

“I have better engagement, better retention, higher averages on exams. All students had access from the very beginning. More students answered questions in class, so appeared to have more confidence ... Students had access on day 1 with no students losing access after a grace period. This seemed to increase morale. I noticed an increased willingness to engage in class and higher exam averages.”

“My sense is that the engagement with the OER textbook was higher this semester than with the for-cost textbook that I’ve used in past semesters.”

“The commercial e-book that we used to use...had some nice features. However, I also know for a fact that about 1/3 of my students would never purchase the commercial e-book in the past. Using the OER materials made course information available to everyone, and thus makes the course more fair and allows for more engagement overall.”

What UM students have to say about using OER in their courses:

“I enjoyed it! I don’t like lugging around a big textbook, it’s nice to be able to access it on the computer and my phone.”

“I have enjoyed the use of the OERs in this course. I believe that it has helped me be a better student in most ways.”

“They were more helpful and interesting than traditional textbooks.”

“I liked the accessibility and the text was really interesting. It was both applicable and easy to read.”

“I really liked it! It was easy to navigate, and I loved that I didn't have to worry about paying for it.”

“Great, I think textbooks are a scam.”

“I really appreciate the fact that I don't need to purchase a textbook for this class. As a college student money is very tight, even when working, so utilizing free resources is wonderful.”

“I LOVED it! Saved me money and was a great resource!”

“Great! It was so easily accessible and so nice that it was free!”
Measuring Savings
The impact of OER use can be readily measured in student savings over time. The MUS OER Initiative strategically invested in activities aimed at maximizing this cumulative power. For example, faculty grants supporting OER use are cumulative and long-term investments in student savings. The single investment accumulates savings year over year because faculty typically use those textbooks each time they teach a course.

Student Savings
In its first year, the MUS OER Initiative invested in programming that will have positive cumulative impacts on student savings far into the future. In its first academic year, the program invested $166,006 in grants supporting 57 faculty to use new OER textbooks and materials in at least one course. A total of 786 students saved on at least one OER textbook during the program’s first year.

In the first year alone, students already have saved $144,261. By year two, this initial investment is projected to save students a total of $536,000. In year three, this same investment will have saved students a total of nearly one million dollars. To ensure that students realize these savings over time, faculty commit to using the OER textbook for three years following the grant award.

1st Year Grant Awards Save Students $$
Investing in OER continues to show increased savings annually

- FY20: $142K
- FY21: $536K
- FY22: $941K

Graph showing cumulative savings from FY20 to FY22.
In its first year, the program was able to make significant impact in awareness and education about OER across the state. Progress made will continue to change the culture, community, and affordability of higher education across the state of Montana.

The OER program respects the unique cultures of each campus, their campus OER efforts, and the academic freedom of individuals within the TRAILS consortium. The long-term goal is to aid and support each campus in creating its own successful textbook affordability initiative. Through the support of this program and the efforts made on individual campuses, 5 MUS institutions began their own initiatives, some with their own institutional funding. These institutional initiatives and the dynamic work led by individuals on those campuses contribute to the statewide culture change and amplify the positive impact on students’ success. These institutions have seen student savings in addition to the savings reported here. This cannot be accomplished without the broad system support that is provided by the MUS TRAILS OER program.
Summation & Looking Ahead

This report records activities and achievements for the first year of this program. There is still a great deal of work to be done to address the program’s efficacy and importance in the new landscape of higher education. While the past several months have seen incredible work on the part of institutions and faculty to transition modes of delivery and access, those efforts are only the beginning of the work to meet the challenges students face. Institutions of higher education are looking for better ways to recruit students and assure them of the stability of higher education in an unstable world, while students are grappling with heavier economic and access challenges than ever. More than ever, open education is part of the answer to these challenges. For faculty, students, and institutions, open educational resources offer a well-established solution to the changing outlook of higher education.

This program remains committed to the objectives and goals outlined, even as we adapt to the needs and changes of our environment. This support, now and in the future, will be able to impact affordability and provide quality resources for students across the state.

Key Priorities for Year Two

- Continue outreach and education to support increased awareness of the value of Open Educational Resources;
- Implement another round of faculty grants supporting OER use in high-enrollment, frequently taught, commonly-numbered courses;
- Develop data infrastructure and design plan for developing a system-wide low-cost or no-cost textbook indicator for course registration;
- Develop statewide infrastructure for institutions to report and track OER use;
- Adapt and respond to new opportunities brought on by increased virtual and remote learning environments by providing faculty support in using OER in online instruction, instructional design with OER, incorporating good news and library resources into online courses, and remote learning accessibility with OER;
- Develop recommendations for how the Montana University System can meet compliance requirements for the federal Affordable College Textbook Act (H.R.2107/S.1036) and the Higher Education Opportunities Act (HEOA);
- A platform for each campus to report and track their institutional savings is being developed in order to better identify total institutional and statewide savings.
- Continue to seek funding opportunities to support increased use of open educational resources at MUS and TRAILS institutions.
Appendix

Definitions

Actual Student Savings: Actual savings are recorded after the first week of each semester in order to use hard enrollment data. Savings are calculated based upon the cost of the course material prior to moving to more affordable options for each student enrolled.

Estimated Student Savings: Faculty report the average number of sections and students enrolled in each course. This is used to estimate student savings in the coming fiscal year(s). With the semester by semester flexibility for sections to be cancelled, added, and student enrollment within each section to fluctuate up or down, this average estimation is the industry standard for projecting impact and savings.

Awards: grants and educational stipends paid to faculty for work or trainings

Adopt Grants: supports faculty in the adoption of an existing open textbook or open course materials

Maintenance Grants: supports the updating of existing OER that requires minor editing without major changes to the content or structure

Adapt Grants: supports the modification of an existing OER with major editing or remixing to the content and structure in order to meet learning objectives

Interactives Grants: funds the creation of ancillary materials to support current or future adoption of open educational resources. Interactives may include resources such as lab manuals or workbooks, quiz banks, online homework systems, videos, interactive homework aids, or other study aids complete with answer sets

Create Grants: supports the creation of a substantially new open textbook or open course where it is possible to demonstrate that quality resources are not currently available to meet learning objectives

Program Dollars: total dollars invested, including salary and benefits of the Coordinators, travel and operational costs, grant and stipends awarded, as well as any other expenses

Award Dollars: all monies given to faculty to cover grant awards, stipends for textbook reviews, stipends for educational trainings, and consequential payroll costs connected to those awards

References

2016 Florida Student Textbook Survey, Florida Virtual Campus.
https://florida.theorangegrove.org/og/items/3a65c507-2510-42d7-814c-ffdefd394b6c/1/

2018 Florida Student Textbook Survey, Florida Virtual Campus.


Grant Awards

Adoption Grants

**SOCI 325: Social Stratification, UM.** Daisy Rooks is adopting new materials for an upper division elective for Sociology and African American studies majors which will incorporate open materials and library resources, integrating current research and reference articles into the text. “I’m in the early stages of learning about OER, but am excited about its ability to improve my SOCI 325 course, and potentially other Sociology courses at UM.”

**HSTR 101, HSTR 102: Western Civilization I & II, FVCC.** Scott Brantner is transitioning Western Civ course to using OER text with focus spring 2020 on aligning course lecture objectives and study materials to match the information presented in the text. Working with others in the department to report out and share results of this grant so that the department can consider for wider adoption.

**HSTA 102, HSTA 102: American History II, FVCC.** Scott Brantner, John Eck. Both instructors will adopt this open textbook. They will work together to identify and create new student assessments, lesson plans, and study guides for both 102 & 103.

**Advanced Reading & Writing: for English Language Learners, UM-ELI.** Sara Schroeder will teach with new OER text and conduct student learning assessments to ensure it is a success in guiding students to learning outcomes mastery.

**BMGT205: Professional Business Communications, FVCC and area dual-credit high schools.** Brenda Rudolph is leading a team which will coordinate to align the courses taught at FVCC and through FVCC to three regional schools as dual credit. This team has created a plan to build common quiz and test banks, common assignments, and other instructional materials such as grammar modules that align with the open textbook that they adopt. This work will strengthen and increase the credibility of the dual credit program while better preparing students for the transition to college level coursework. “Thank you for this opportunity. This research will affect a lot of students, and it is unique in that it involves several different campuses including college and high school.”

**GBLD 194: Migration & Refugees, UM.** Gillian Glaes is redesigning a popular freshman seminar course utilizing OER and current articles and reference sources through the library to create dynamic learning experience for students while engaging them in current social issues.

**LING 270S: Linguistics, UM.** Mizuki Miyashita is transitioning this course to an OER text, using student assessment and outcomes to evaluate the quality and viability of this resource.
LING 472, 572: Syntax, UM. Tully Thibeau. OER textbooks don’t exist for this level of course, but there are resources to support language understanding that meet course requirements. This project will adopt and create complementary OER resources for upper and graduate level courses.

LSCI 125: Research in the Information Age, MSUB. Cheryl Hoover, Megan Thomas, Eileen Wright, Tyree Jenks are making a department wide adoption for all information literacy courses to an OER text. This team each evaluated and reviewed different texts in order to select the text that best meets learning objectives.

STAT 216: Introduction to Statistics, MSUB. Tien Chih is adopting the most widely used Stats OER textbook for all sections of STAT 216, assessing the value and success of OER in this course.

STAT 341: Introduction to Probability and Statistics, MSUB. Tien Chih will adopt an open textbook for this course as well as modify curriculum to no longer using publisher access code for online homework platform. New open platforms have been identified for infinity and probability assessments for students.

M 305: Discrete Structures I, MSUB. Tien Chih “I am developing M 305 to be a online course, as it will be added to the Teaching Math Minor, and MSUB hosts the only such online program in the state. We will implement an OER text, that has embedded Sage cells for the purpose of introducing some programming elements and for an concrete interactive element for the course. Students will write and submit Sage code through Cocalc, and written homework in a math typesetting language LaTeX through Overleaf.”

M121-01: College Algebra, City College. Chairsty Stewart is adopting OER for this corequisite mathematics course that will be running in a new format. The adoption includes a transition from both the publisher text, $135 per student, and the online homework system, $65 per student, to an open text and a low-cost homework platform.

Maintenance Grants

M 161: Survey of Calculus, UM Western. The entire Math Department is creating an open calculus text for science majors that will include authentic biology and environmental science content within the text. The team will create a cohesive structure within the text so that science students can relate and apply the mathematical concepts throughout.

BIOH 104: Basic Human Biology, FVCC. Chaz Taylor. The most current OER text needs to be modified for the 100-level course, question banks need to be developed. Additional learning resources (animations, videos etc.) also need to be included.

BIOH 104 Lab: Basic Human Biology Lab, FVCC. Chaz Taylor. This project will align the lab manual, add in several experiments that are not included, making a new manual that meets the course outcomes.

BIOB 226: Life Sciences, MSUB. Annie Green. The course is a general education requirement for elementary teachers. This course is the only training that elementary science educators receive in the life sciences. This updated course will be a broad survey course of Earth and Life Sciences. I will cover the co-evolution of Earth (materials) and life, introduce evolutionary principles, geologic time, provide a
foundation for underlying chemical and physical concepts, and cover major biological principles of life and more chemistry. It will combine elements of the three open educational texts above as well as add some material to create unique texts for this lecture and lab course.

**BMKT 411: Services and Relationship Marketing, MSUB.** Anna Talafuse, Brenda Dockery, Jessie Perius are creating a new text from various current OER texts in order to align with the course learning objectives. The course also centers on an experiential learning project using real clients from the community to measure, monitor, and assess customer service at the organization and develop loyalty program suggestions for a final report. The content for this report and loyalty programs will need to be developed or supported through outside resources to replace the current text used in the course. Maintenance will include realignment of discussions, assignments, and the group experiential learning project.

**Interactives Grants**

**M 121-01: College Algebra, City College.** Chairsty Stewart will create student notes and study guides, quizzes, written assignments, and exams to align with the adopted open textbook. These will be published and used worldwide. In addition to provided necessary ancillary material for the adoption of an open text, this project will focus on aiding students in note-taking skills, and those specific to mathematics instruction. The purpose is to maximize student success. These materials will be readily adaptable to other mathematics courses.

**STAT 216: Statistics, MSUB.** Tien Chih is creating a question/problem bank written in a new online homework platform. This material will be written to coincide with the OpenStax Statistics newest edition text, the most widely used open textbook worldwide. All materials created will be share across the state as well as internationally.

**HSTA 101, 102: American History II, MSUB.** Emily Arendt. In addition to adopting an open text for this course, this faculty member will be developing and publishing quizzes and assessments for 11 units of the text. Additionally, based upon research and student feedback, this instructor is developing digital flashcards as study aids. Both the interactive flashcards and the quiz banks will be created to upload into LMS systems for ease of use.

**CJUS 236: Introduction to Research Methods, MSU Northern.** Samantha Balemba & Caleb Hutchinson. Building upon the open textbook being adopted, these faculty members will be recording and creating video resources, creating LMS test banks, creating PowerPoints, creating lesson plans and assignments; course content would be incorporated into the institutional LMS and used in the classroom; content would be shared via major OER repository sites (e.g., Merlot, OER Commons). Students typically struggle with this course. The new text and subsequent materials will make this a smoother and hopefully more successful course for students.

**NRSG 291: Stress Less, Holistic Health Promotion, MSU.** Alice Running. This is a new course that educational profession is in great desire for. Working with MSU librarians, this faculty member is utilizing OER or open access materials for the text. With some learning gaps and a great need for assessment pieces, this grant will fund the development of workbooks, fitness logs, an assessment repository including resources such as Qualtrics surveys. This faculty member will also be conducting
research with technologies to map stress and aid in stress reduction. All of this will be shared out under an open license. This faculty member is also in the institutional process of offering a graduate level version of this course.

**EDU 225, 101: Introduction to Educational Psychology, MSU Northern.** Joseph Todd. This project will ultimately create an LMS course pack that will be available in part or as a whole to import into any LMS and will include an outline notes, interactive presentations and lecture notes, quizzes, exams, projects and other assessments that are coordinated with the adopted open textbook.

**Create Grants**

**M 143: Business Math, MSUB.** Tien Chih. With no current textbooks available that include any Finite Math, this faculty member will write and publish a complete text for this course including Finite Math, an essential part of the curriculum. Beyond the textbook, the project will include interactive digital elements such as graphing and problem solving.

**NUTR 411: Nutrition for Sports and Exercise. MSU.** Mary P. Miles & Stephanie Wilson. While there are good open textbooks for this course, there is not any lab manuals developed within the open community. This project will write and publish a Nutrition for Sports and Exercise Laboratory Manual that includes specific laboratory activities such as relating to use of carbohydrate versus fat during different exercise activities, response of blood sugar to consumption of sport supplements, and calculations of energy availability based on physical activity energy expenditure and body composition.

**M 111: Technical Mathematics, Gallatin College.** Aubrin Heinrichs, Lisa Browne, & Philip. A textbook for Technical Mathematics M111 aimed at the Machining Industry to support classes community college and dual credit classes at regional high schools. Current machining texts are using dated complex machining process that are irrelevant and leave students unprepared for job placement. This text will include basic mathematics necessary for machining as well as business mathematics which will increase skills in the small business or broader business world. A specific example is sections that include basic number theory, Cartesian coordinates, basic geometry, right angle trigonometry, part tolerancing, GD&T, costing, and time value of money.

**LIT 309: Popular Genres, MSU Northern.** Valerie Guyant. Literature texts are uncommon in the open education field. There is a lot of material in the public domain, however finding new, relevant, topics that are interest to students is challenging. This project will create a course based upon current and classic literary pieces specific to crime writing. It will include the text, readings, multimedia presentations, films, as well as all supplementary materials such as prompts for projects, lecture outlines, discussion topics and prompts, and assessments. This will provide a template that can be modified to other topics and literary themes. All materials will be openly published with videos existing in a course YouTube channel that will house additional topics as new courses are designed.

**BMGT 101, 275, 401, 402: Entertainment Management, UM.** Mike Morelli. This project will create an app that teaches students how to identify, buy, market, and present artists in venues to meet revenue goals which will replace a variety of texts required to do the same thing. There is no analogous app like this available for free (or pay) on Google Play or the Apple App Store. This app will meet the learning
outcomes of all courses in the program. This one-of-a-kind approach to open education will replace all required course materials while being the first OER for this major nationwide.

**ECHM 442, 443, EBIO 442: Technical Communication for Bio and Chem majors, MSU.** Stephanie Wettstein, Trent Browne, Kate Morrissey, Phil Russell. This project is a department-wide creation and adoption of upper division technical writing books that are above and beyond what any current open texts, meeting course objectives including: improving the students technical writing abilities, improving technical communication, and being able to do valuable statistical methods. This project will include material specific to chemistry, biology, and engineering programs of study. Additionally, ancillary material would be developed that complements the textbook.

**WRIT 101, 121: Writing Fundamentals, Introduction to Technical Writing, Montana Tech.** Dawn Atkinson & Stacey Corbitt are writing a new writing textbook created in the co-requisite approach that is taught at MTech. This new textbook, complete with assignments, exercises and activities approaches foundational writing skills with relevant career and job skills applications throughout.
Activities, Events, and Marketing Examples

FALL 2019

OCT 15TH
Faculty Virtual Textbook Review Workshop

OCT 17TH
Community College Webinar on Equity, Diversity, and Inclusion in OER

OCT 23RD
Faculty Virtual Textbook Review Workshop

OCT 28TH
ReDesign Your Course with OER Class Begins

NOV 4TH
Faculty Virtual Textbook Review Workshop

NOV 13TH
Community College Webinar on Measuring OER Impact Research

NOV 15TH
Open Pedagogy Practices Webinar

CLICK ON ANY EVENT FOR MORE DETAILS AND TO REGISTER.

TRAILS OER IS A MONTANA UNIVERSITY SYSTEM SPONSORED PROGRAM.
EARLY SUMMER 2020

APRIL-AUGUST
ReDesign Your Course with OER online asynchronous class

WEEKLY
Faculty Virtual Textbook Review Workshop

MAY 6TH
User Friendly Design with OER

MAY 12TH
Perfecting Your Virtual Workshop

MAY 20TH
Inclusive Access: a community conversation

MAY 28TH
Incorporating Good News into your online course.

JUNE 12TH
OER From the Top: administration and leadership roles in creating a campus initiative

JUNE 22ND
The Art of Lecturing Online

FOR FURTHER DETAILS, REGISTRATION, AND MORE SEE THE COMPLETE SCHEDULE AT BIT.LY/2WB5MQC
Campus Bookstores & Open Educational Resources

Impacting Students’ Lives

Why should a bookstore care about OER? Doesn’t it hurt their profits? How can it be good for the bookstore, the instructor, and the students?

Campus Bookstores uniquely see the impact of textbook prices on each student. They see the frustration of students who can’t afford or are struggling to afford required course materials. They see the emotion when a student can’t sell back their textbook because the edition has changed, their teacher only used a chapter or two, or (insert many other reasons).

Get in touch for more resources & information TRAILSMT.org/OER

Images are licensed to Canva. Content is licensed under a Creative Commons Attribution 4.0 International License to Christina Trunnell. TRAILS: Montana University System
Bookstores Matter!

They...
- Know more about what faculty are teaching with and publishers are offering.
- Understand the impact of textbook costs on students.
- Hear what students are saying about their finances and their needs.
- Want to see students succeed.
- Want to provide the best service to students and faculty.

And Yet... they have an obligation to be financially sustainable. Reducing sales of pricey textbooks reduces profit, right?

The Actual Facts for Bookstores

According to data from NACS (National Association of College Stores) campus bookstores can actually make more money supporting OER than with traditional textbooks.

Say What?!

NACS shows the average college bookstore can collect on textbooks is 3.7% of the retail price. If a book is $200, $7.40 is the pre-tax profit.

Bookstores have an incredible opportunity to offer print-on-demand services to students when faculty adopt OER.

For Example:

If an OER Psych textbook costs the bookstore $10 to provide a printed copy. Then, we add in the overhead costs, etc., and average the same pre-tax profit as that $200 textbook. The bookstore would have to charge $18 for the book to keep making the same profit. If the bookstore charged $20 per book, they make more money and each student is saving $180 per book. This is what business calls a Win-Win scenario.

Ultimately, the campus bookstore has the best position to positively affect students and faculty. Partnering with OER efforts can help increase revenue, provide necessary accessibility options for students, aid faculty in choosing quality materials, and save students money.
The Textbook Affordability Problem

Textbook prices are out of control.

- Textbooks for average over $300 for one course.
- Over the past decade, textbook prices increased over 52%, and over 200% in the past 20 year. That’s three times the rate of inflation!
- 5 publishers control 80% of the market. There is not competitive pricing.
  Students (the customers) can’t shop around for the best product.
- Publishers and not faculty drive the cost of textbooks up.

Textbook prices keep students from their higher education goals.

- 65% of students report that they skipped buying or renting an assigned textbook because of cost.
- Without access to books, students struggle to succeed in their classes.
- Nearly half of all students say that the cost of course materials impacts which classes and how many classes they are able to take.
- Students take longer to complete their degrees, incurring more debt in part due to textbook costs.

Open educational resources are a solution.

It’s more than a free textbook, it’s a quality education.

- Open textbooks are the same as a publisher textbook, except that they have an open copyright license allowing access.
- Open materials are available for free digitally and for a very low cost in print.
- Colleges and universities in the US who use OER save students nearly a billion dollars per year.
- Research shows that OER are as effective, if not more effective in the quality of education.
- Research shows that students in OER courses are passing at higher rates than their peers in non-OER courses.
- Faculty can customize their course materials to better fit their classes and their students’ needs.
Open Education in Montana

Montana higher education is already working to make education more affordable and accessible. Together, the Montana University System and TRAILS, Montana’s academic libraries, have partnered to offer a statewide open educational resources program. We are making textbooks more affordable with quality education every day.

Working with:
- Campus leaders
- Faculty
- Students
- Libraries
- Bookstores
- Instructional support staff

Providing:
- Professional Development opportunities
- Grant funding for faculty to incorporate OER
- Copyright & open licensing assistance
- Course Design instruction and guides
- Publication assistance
- And so much more...

The OER program recognizes that each Montana campus has different needs, cultures, and roles in this work. We offer resources and the help uniquely customize them. The OER program also serves as a platform to connect Montana faculty and their work with the open education community worldwide.

Become a part of the solution! Find out more at www.trailsmt.org or follow us @OpenTRAILSMT
For questions, contact christina.trunnell@montana.edu