

California State Board of Education Policy SUBJECT Guidelines for Piloting Textbooks and Instructional Materials	POLICY # 01-05
	DATE January 2015
REFERENCES <i>California Constitution</i> , Article IX, Section 7.5. <i>Education Code</i> Sections 60060-60062, 60200-60206, 60210, 60400-60411.	
HISTORICAL NOTES Adopted, June 1989. Revised, June 1995 and September 2001	

Forward

These guidelines have been revised to reflect changes in law related to the flexibility of local instructional materials reviews and the local control funding formula. They are designed to touch upon major considerations most likely to be universally applicable to local educational agencies (LEA) and offer suggested strategies. They are offered for grades K–8; however, they may be adapted for grades 9–12.

Introduction

The California State Board of Education (SBE) has constitutional authority to adopt textbooks for grades one through eight (Article IX, Section 7.5 of the California Constitution) and statutory authority to adopt instructional materials for kindergarten. *Education Code (EC)* Sections 60200-60204 describe the process for the adoption of instructional materials for these grades and mandate that submitted materials be evaluated for consistency with adopted content standards and specific evaluation criteria approved by the SBE. (The evaluation criteria are incorporated in the curriculum frameworks.) *EC* Section 60010(h) defines instructional materials as “all materials that are designed for use by pupils and their teachers as a learning resource and help pupils to acquire facts, skills, or opinions or to develop cognitive processes. Instructional materials may be printed or non-printed, and may include textbooks, technology-based materials, other educational materials, and tests.” The SBE traditionally adopts only basic instructional materials programs, i.e., programs that are designed for use by pupils and their teachers as a principal learning resource and meet in organization and content the basic requirements of a full course of study (generally one school year in length).

An LEA may choose to use instructional materials that have not been adopted by the SBE, pursuant to *EC* Section 60210, so long as they are aligned to state standards and a majority of the participants of any review process conducted by the LEA are classroom teachers who are assigned to the subject area or grade level of the materials being reviewed.

The process of selecting and implementing new instructional materials should be thoroughly planned, conducted publicly and well documented. At every step an LEA should adhere to *EC* Section 60002 which states the following: “Each district board shall

provide for substantial teacher involvement in the selection of instructional materials and shall promote the involvement of parents and other members of the community in the selection of instructional materials.”

I. Determining Materials to Pilot

The SBE-adopted curriculum framework for the respective subject will provide extensive information regarding initial selection of instructional materials. A review of the curriculum framework will be the first step in any curriculum development and instructional materials selection process.

In selecting instructional materials to pilot, a district may either choose from programs on the current SBE-adopted list of recommended materials, or the district may conduct its own independent review. In either case, the steps identified below are critical to the process.

The format of instructional materials may include print, technology-based or a combination of both, as identified in *EC* Section 60010(h).

1. Establish a representative committee charged with recommending instructional materials for district adoption. The committee should involve representatives of all populations in the district including, parents, administrators, teachers at all grade levels, English learner programs, and programs to support students with special needs. The committee will:

- Review criteria for evaluation of instructional resources as outlined in the most recent SBE-approved curriculum framework for the subject area under consideration. Whether choosing from the SBE-adopted list or conducting an independent review, a thorough understanding of the SBE’s evaluation criteria will be helpful. These criteria include alignment with the SBE-adopted content standards, program organization, assessment, universal access, and instructional planning with teacher support.
- Review, as appropriate, the *Toolkit for Evaluating Alignment of Instructional and Assessment Materials* developed by Achieve, the Council of Chief State School Officers, and Student Achievement Partners located at http://www.ccsso.org/Resources/Digital_Resources/Toolkit_for_Evaluating_Alignment_of_Instructional_and_Assessment_Materials_.html.
- Review SBE or District adopted grade level content standards for the specific subject area under consideration.
- Review the SBE Adoption Report of Instructional Materials which outlines the K–8 state adoption process and the state level evaluations of each program.
- Identify student strengths and weaknesses using district or site level data as appropriate. Disaggregate measures of student achievement in mathematics and

language arts from statewide tests results. Review results from district assessments in the content area for which materials are being adopted. District assessment data would be especially useful for the content areas that do not have CAASPP results.

- Identify student diversity/universal access issues that instructional materials need to address—above grade level, below grade level, English learner populations, and special needs populations. Ensure that the instructional materials being considered provide equitable access to all areas of the curriculum for all students. The curriculum frameworks contain extensive information regarding this access. The federal Individuals with Disabilities Education Act (IDEA) requires an LEA to provide accessible instructional materials to students who need them for participation and achievement. While SBE-adopted materials are available in accessible formats from the CDE, an LEA utilizing non-adopted materials will need to obtain digital files and have them converted to accessible formats, such as braille and large print books.

2. Define and prioritize evaluation criteria. Develop an evaluation instrument. The evaluation instrument should reflect criteria from the State, but it should also reflect district or site specific concerns, such as, organization of teacher materials, management/availability of supplemental materials, required level of teacher knowledge, preparation time, etc. The evaluation instrument can also be used as a guide for a preliminary screening of suggested instructional materials for piloting so that only the few programs most closely aligned with the identified evaluation criteria will be piloted. It is difficult to adequately monitor and support piloting of more than two to four programs.

3. Ensure that instructional materials comply with the state laws and regulations for social content. Instructional materials must meet *EC* Sections 60040–60045 as well as the SBE guidelines in the *Standards for Evaluating Instructional Materials for Social Content*. These laws and the SBE guidelines require that instructional materials used in California public schools reflect California’s multicultural society, avoid stereotyping, and contribute to a positive learning environment. Instructional materials that are adopted by the SBE meet the social content requirements. The CDE conducts social content reviews of a range of instructional materials and maintains an online, searchable list of the materials that meet the social content requirements. If an LEA is not purchasing state-adopted instructional materials or materials from the list of approved instructional materials maintained by the CDE, the LEA must ensure that the review for social content review is done at the state or local level. An LEA may require a publisher to submit its materials for social content at the state level before the materials are adopted at the local level. Information about the review process and the CDE’s searchable database can be found on the CDE Social Content Review Web page at <http://www.cde.ca.gov/ci/cr/cf/lc.asp>.

II. The Pilot

Piloting instructional materials using a representative sample of classrooms for a specified period of time during a school year is a frequent part of the adoption process in many school districts. A structured and monitored pilot process can be helpful to school districts and school sites as they consider the adoption of instructional materials.

An effective pilot will help determine if the materials will actually provide teachers with the needed resources to implement a standards-based instructional program. The core of the pilot process is determining the relationship of the materials to the standards and the teachers' evaluations of how well the materials provide students access to the standards. The actual use of the materials in classrooms will provide teachers experience with the program's organization, assessment, and range of instructional strategies. The evaluations of the pilot teachers will carry considerable influence at the decision making time.

The piloting process, being mindful of *EC* Section 60002 as quoted above, should also involve representatives of all populations in the district including, parents, administrators, English learner programs, and programs to support students with special needs.

Listed below is a suggested chronology of the local pilot process.

1. Contact selected publishers to ascertain what assistance they will provide, e.g., number of pilots at free or reduced cost, in-service for the pilot teachers, consultation with teachers during the pilot process.
2. Establish the district contact for the selected publishers. Set firm ground rules with the publishers and teachers. Limit the amount of materials that can be distributed and to whom. Maintain a careful list of what materials are being used in each classroom in order to ensure student access to appropriate complete and rigorous content.
3. Ensure that teachers are comparing similar components of competing programs by standardizing the components to be piloted, e.g., intervention materials, English learner support, skills reinforcement.
4. Consider the use of formative assessments and pre and post testing. This might be done with subject areas that are used to determine statewide test score or to determine retention/promotion policies.
5. Establish a system for removing non-consumable materials when the pilot is completed. Keep teachers, publishers, and site administrators informed of timelines and procedures.
6. Determine the duration of the pilot. Determine what information is needed from the pilot and give teachers enough time to develop a complete unit or concept so that they

will be able to evaluate the program fairly. It is preferable to have teachers use more than one program. This establishes a basis for comparison and evaluation.

7. Set up the pilot sites to represent the various student populations and teacher populations. Have programs distributed equally among grade levels.

8. Require that teachers attend an in-service training for their materials. They need to know what they have and how to use it in order to fairly evaluate the materials. They also need to understand that they are part of a small group of people who will be giving valuable input to the selection committee.

9. Review the evaluation instrument with the pilot teachers at the in-service training. Distribute it to the publishers prior to the in-service training, so they can address criteria during the in-service training.

10. Gather evaluations promptly when the pilot process is completed. Compile results and distribute them to the selection committee, teachers, and publishers. Look for trends by grade level, criteria and particular school populations. The committee should use the evaluations as one step in the adoption process.

III. Additional Piloting Considerations

1. Keep the offerings of each publisher consistent with the other publishers, so that a bias will not be established toward a publisher who is more “generous”.

2. Caution teachers and publishers about accepting or offering gifts, gratuities, meals, etc. Pilot evaluations need to be based on the merits of the program and its effectiveness with student learning. It is recommended that *EC* sections 60070–60076 be reviewed as these sections specify the prohibitions between publishers and school officials.

3. Establish firm guidelines regarding contact between publishers and district personnel at the outset of the piloting process and monitor during the process. To assist in setting guidelines, it is advisable to review the *EC* sections dealing with instructional materials (grades K–12, sections 60052–60076; grades K–8, sections 60200–60112; grades 9–12, sections 60400–60411).

4. Inform evaluation committees that publishers must comply with numerous statutes and regulations. In particular, evaluation committees should be aware that publishers are prohibited from publicizing in their marketing material excerpts, in whole or part, from state adoption reports.

5. Verify correlations/standards maps supplied by publishers to actual standards and check the references to specific lessons and page numbers. Materials adopted by the SBE must be aligned to the standards.

6. Survey educators outside the district to explore their experiences with the instructional materials that are being piloted or considered for adoption.

IV. Curriculum Mapping Considerations

If using materials from more than one source, i.e. basal program, to provide content aligned to the SBE-adopted standards, an LEA should develop a curriculum map to identify the materials to be utilized to provide complete coverage of the standards. This documentation is important for determining whether or not the LEA is in compliance with *EC* Section 60119, commonly known as *Williams'* instructional materials sufficiency. This law in part requires that each pupil in each school in the school district has sufficient textbooks or instructional materials, or both, that are aligned to the content standards adopted pursuant to *EC* Section 60605 or 60605.8 in each of the following subjects, as appropriate, that are consistent with the content and cycles of the curriculum framework adopted by the SBE: mathematics; science; history-social science; and English language arts, including the English language development component of an adopted program. While in the past an LEA typically utilized one SBE-adopted program for a particular grade level, in this era of local control, LEAs are beginning to incorporate additional materials. An LEA may utilize a textbook, a supplemental component, and online resources. It is important that an LEA demonstrate that students have access to this content both in the classroom and to take home, pursuant to *EC* Section 60119.