

DRAFT

Montana

Standards-Based Instructional
Materials Toolkit: Guidelines
for Evaluation, Selection, and
Implementation



opi.mt.gov

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Purpose

This toolkit is a dynamic guide to assist Montana districts in the evaluation, selection and implementation of standards-based instructional materials that best meet the needs of their students. The toolkit provides a **process** and resources to assist districts in evaluating, selecting, and implementing standards-based materials that meet their needs and support student achievement.

The process of evaluating, selecting, and implementing effective and well-aligned materials has become both complex and compelling as districts incorporate standards-based instruction. Historically, basal textbooks were the focal point in instructional materials adoption processes. The textbook was seen as the single and most significant instructional tool used by classroom teachers. In today's classrooms a more comprehensive set of instructional materials must be available to effectively teach the academic standards outlined for each content area. This includes resources such as technology programs, supplementary reading materials, and hands-on materials. Therefore, it is imperative that districts use a thorough and systematic approach to the instructional materials selection process.

Because of time and resource constraints, the selection of instructional materials is often hurried through without much thought or consideration. However, the selection of instructional materials is crucial to effective standards-based education. Instructional materials selection should be grounded in state content standards and tailored to individual district needs. Resources to assist in this process will be found in the Appendices.

The use of rigorous, appropriate standards in content areas to improve learning for all students took hold in 1994, with the *Goals 2000: Educate America Act*. Since 1994, numerous studies of standards-based education have been conducted. McREL, in 2005, released *The Influence of Standards on K-12 Teaching and Student Learning: a Research Synthesis*, which analyzed 113 research studies on standards-based education. McREL concluded that "standards (defined as agreements about the content that students should know and the levels at which they should know it) are most effective when translated into curricula and curriculum frameworks that are aligned with instructional materials and student assessments" (Lauer et. al. p.65

http://www.eric.ed.gov/ERICWebPortal/search/detailmini.jsp?_nfpb=true&_ERICExtSearch_SearchValue_0=ED486687&ERICExtSearch_SearchType_0=no&accno=ED486687).

Montana implements a purposeful process to revise standards in all content areas. Educators from across the state collectively review and provide expertise that is reflected in the content standards. The next and most critical step, as evidenced by the McREL study, involves translating these standards and expectations into local curriculum which then guides the selection of instructional materials and assessments.

The following terms are used throughout the toolkit:

- **Standards-based Education** is a systematic approach to improve student learning through planning, implementing and monitoring of academic programs, learning environments, and organizational structures. It provides all children with challenging academic expectations, identifies what students should know, understand and be able to do and guides local curriculum and instruction.
- **Montana Content Standards** provide the foundation for standards-based education in the state. This is a blueprint for developing curriculum, instruction, and assessment. In order to use the Montana Content Standards effectively, it is essential to understand the distinctions between various components.

Montana Content Standards Components		
English/Language Arts	Mathematics	Other Montana Content Standards
Strands are larger groups of related standards (e.g., writing)	Domains are larger groups of related standards. (e.g., operations and algebraic thinking)	K-12 Content standards indicate what all students should know, understand, and be able to do in a specific content area, such as science, social studies, or technology.
Key Topics are groups of related standards within a strand (e.g., Within reading, range of reading and level of text complexity is a key topic).	Clusters are groups of related standards. Note that standards from different clusters may sometimes be closely related, because mathematics is a connected subject (e.g., within geometry, identify and describe shapes is a cluster).	Benchmarks define our expectations for students' knowledge and skills along a developmental continuum in each content area. That continuum is focused at three points – the end of grade 4, the end of grade 8, and upon graduation (grade 12).
Standards are what students should know and be able to do.	Standards are what students should know and be able to do.	Essential Learning Expectations are specific statements of what all students should know and be able to do at a grade level. An Essential Learning Expectation measures student progress toward meeting a Benchmark.
	Standards for Mathematical Practices describe varieties of expertise that mathematics educators at all levels should seek to develop in their students.	Performance descriptors define how well students apply knowledge and skills. Performance descriptors are the specific expectations for performance in each content area at each of the three benchmarks, grades 4 and 8, and upon graduation.

Curriculum defines the coherent set of related ideas, concepts, and skills that guide instruction. It is the organization of standards into a plan that describes the manner (sequence, for how long) in which the standards will be taught and assessed. It is developed at the district or consortium level and includes written documents based on the state K-12 content standards. Montana Office of Public Instruction has developed a *Montana Guide to Curriculum Development* <http://www.opi.mt.gov/curriculum-guide>. This guide is intended to provide a consistent and clear definition of the Montana standards-based education philosophy as well as practical information and resources to assist in the design and implementation of curricula aligned with the content and performance standards.

Instructional Materials are instructional tools and resources used to teach the standards-based curriculum. They can be print or non-print items. They can be published or teacher-created.

- **Primary Resources** are the main instructional materials used within a course, and may include a range of materials from textbooks to multimedia. They are comprehensive, contain an extensive scope and sequence of skills and concepts, utilize a variety of instructional strategies, and identify the primary instructional tool for a grade level.
- **Supplemental Resources:** are the instructional materials that support or enhance but do not replace adopted primary resources and curriculum. These resources should address specific instructional needs of students.
- **Incidental Resources:** are the instructional materials used occasionally within classrooms at the discretion of the classroom teacher.
- **Research-based Instructional Materials** are not synonymous with materials that are “based on research.” Research-based instructional materials are validated through empirical research that employs systematic methods that draw on observation or experiment, has been accepted by a peer-reviewed journal and/or approved by a panel of independent experts, and can be generalized. For example the [What Works Clearinghouse](#) (WWC) reviews programs using scientifically-based evidence. To be included in the WWC review, a study must use one of the following designs: randomized controlled trial, quasi-experimental, regression discontinuity, or single subject. This online resource is valuable when examining instructional materials.

Typically, research conducted by the publisher or author of instructional materials does not meet these criteria. Districts are encouraged to be discriminatory consumers of research. Although research-based and/or scientifically-based is a primary consideration, a discriminating consumer must also consider the match to standards as well as current district needs, capacity, and resources. **The Common Core State Standards Mathematics Curriculum Materials Analysis Project** provides a systematic set of tools to assist selection of curriculum materials that support implementation of the Montana Common Core Standards. [mathematics curriculum analysis report - Google Search](#) In addition, **Publishers’ Criteria for the Common Core State Standards in English Language Arts and Literacy, Grades K-2 and 3–12** outline a set of criteria that are designed to guide publishers and curriculum developers as they work to ensure alignment with the Common Core State Standards in developing reading materials for the early grades and in English language arts (ELA) and literacy for history/social studies, science, and technical subjects. [publisher criteria for common core - Google Search](#)

- **Rigor** is an elusive term with multiple meanings. In the Montana Content Standards, *rigor* is a process where students:
 - Approach content with a disposition to accept challenge and apply effort;
 - Engage in work that promotes deep knowledge of content, analytical reasoning, and use of appropriate tools; and
 - Emerge fluent in the content, proficient with the content's tools, and empowered as critical thinkers in the content area.

Part 1 and 2 of this toolkit provide information to guide a district in understanding the state and district perspectives that influence the selection of instructional materials, as well as an effective selection process and the necessary tools needed to carry out that process. This toolkit was created by the Office of Public Instruction in cooperation with a committee of educators from across Montana and experts from Education Northwest. The committee intends this to be a useful resource as districts embark on a process of instructional materials evaluation, selection, and implementation.

Part 1: State Level Perspectives

There are many factors in education that impact the process of instructional materials selection. Some of these factors are a result of state-wide requirements and initiatives. Montana educators must consider the Montana Content Standards, the Continuous School Improvement Plan, and Indian Education for All in any process of instructional materials selection. The following sections provide an overview of these three key aspects of education in Montana.

Alignment and Implementation of Montana Content Standards

The Montana Content Standards are not about mandating curriculum or recommending specific courses in Montana's schools. Instead, they are about preparing students to be college and career-ready and live successfully in a society that is increasingly technical, global and multicultural. The Montana Board of Public Education sets high expectations for the learning of all Montana students. It is the responsibility of local communities and districts to determine the best resources and courses that are most appropriate for their students to achieve these goals set by the state.

Any instructional adoption process must be grounded in the specific content expectations as defined by the relevant content standards adopted by the Montana Board of Public Education. Before beginning an instructional materials adoption process, it is critical that the members of any adoption process team develop a common and in-depth understanding of the content standards that are the focus of the adoption. This requires an intensive discussion that clarifies the organization, terms, and most importantly, the learning targets described in the district's curriculum to ensure that all members of the instructional materials adoption team are "on the same page". A well developed curriculum is a key piece for this process. *The Montana Guide to Curriculum Development* <http://www.opi.mt.gov/curriculum-guide/> is a resource to develop curriculum.

For example, a science instructional materials adoption team looking at the first Grade 8 benchmark for Standard 3 *"compare the structure and function of prokaryotic cells (bacteria) and eukaryotic cells (plant, animal, etc.) including the levels of organization of the structure and function, particularly with humans"* would need to identify the agreed-upon specific cell structures, functions and levels of organization their students should know to meet this benchmark.

In addition to developing a common understanding of what the relevant content standards identify for students to know and be able to do, the instructional materials adoption team must consider and develop agreement on the pedagogy necessary for achieving these learning targets. When examining instructional materials, consideration must be given to how the materials will support students in learning the desired content and how they will assist teachers in implementing the most effective and appropriate pedagogy to ensure all students are successful in learning the content. The instructional materials adoption team should also discuss the potential professional development that will be required for effective implementation of the identified pedagogy in preparation for examining materials.

The science instructional materials adoption team cited in the previous example would also want to identify how teachers should design learning activities to provide students with opportunities to

learn the specific cell structures and functions **and** develop the abilities and knowledge to be able to make the comparisons the benchmark requires. If the team also discusses potential professional development teachers would need to ensure all students are successful in meeting proficiency for this benchmark, they will be better prepared to review instructional materials.

To make reliable judgments when reviewing instructional materials, it is necessary that all members of the adoption team examine the materials through the same lens. This common perspective is developed by intensive and in-depth discussions focused on the district curriculum that is aligned to the state-adopted content standards. This must occur prior to beginning the examination of the materials. The appendices of this toolkit provide examples of activities and tools that can be used to facilitate these critical conversations.

Coordination with the Continuous School Improvement Plan (CSIP)

The Board of Public Education established the requirement (ARM 10.55.601) that all districts develop, implement, evaluate, and revise a single continuous school improvement plan to ensure continuous educational improvement for all students and all schools. The single comprehensive plan contains two key components:

- **District Plan** - The ultimate goal is for a district to generate a single comprehensive education plan that meets local needs and the needs of all state and federal programs, with specific program amendments as necessary.
- **School Plan** – Every school in the district will develop a continuous school improvement plan to foster continuous educational improvement throughout the district and to meet the needs of all students.

The district and school plans contain:

- a school/district level education profile;
- school/district educational goals;
- a description of planned progress toward implementing all content, performance, and program areas standards;
- a description of strategies for assessing student progress toward meeting all content and performance standards; and
- a professional development component.

In addition to the components listed above, the district and school plans also contain an Annual Progress Report. The purpose of this yearly plan is to systematically move districts and schools toward accomplishing their continuous school improvement plan. The Annual Progress Report provides a set of specific goals for the coming year that include measurable objectives, identified strategies to meet the objectives, any needed professional development to support those strategies and a summary of the resources required.

Before beginning an instructional materials adoption process, it is critical that the team develop a common and in-depth understanding of the CSIP. The instructional materials review team must use the

CSIP and the Annual Progress Report to identify the current landscape of the school/district. To ensure that the instructional materials adoption process is coordinated with the CSIP, the members of the review team must have knowledge of the plan and must consider how the content area under review relates and contributes to the school/district goals. This tool-kit also provides examples of activities and tools that can be used to develop the necessary knowledge of the CSIP to ensure coherence of the instructional material review with other district initiatives. The District Level Perspective and Process section of this document describes in more detail how the team incorporates the perspective of the school/district into the instructional materials review and selection process.

Integration of Indian Education for All (IEFA)

In 1972 Article X of the Montana Constitution outlined educational goals and duties in Section One of Education and Public Lands. The State Level Perspective Section of this document states:

- it is the goal of the people to establish a system of education which will develop the full educational potential of each person,
- equality of educational opportunity is guaranteed to each person of the state, and
- the state recognizes the distinct and unique cultural heritage of the American Indians and is committed in its educational goals to the preservation of their cultural integrity.

This is the foundation for the establishment of Montana Code Annotated (MCA) 20-1-501 Indian Education for All. The codes states:

- Every Montanan, whether Indian or non-Indian, be encouraged to learn about the distinct and unique heritage of American Indians in a culturally responsive manner.
- Every educational agency and all educational personnel will work cooperatively with Montana tribes or those tribes that are in close proximity, when providing instruction or when implementing an educational goal or adopting a rule related to the education of each Montana citizen, to include information specific to the cultural heritage and contemporary contributions of American Indians, with particular emphasis on Montana Indian tribal groups and governments.
- It is also the intent of this part, predicated on the belief that all school personnel should have an understanding and awareness of Indian tribes to help them relate effectively with Indian students and parents, that educational personnel provide means by which school personnel will gain an understanding of and appreciation for the American Indian people.

In response to the adoption of this MCA, the Office of Public Instruction (OPI) brought together representatives from all the tribes in Montana and created seven Essential Understandings regarding Montana American Indians. These understandings are based on some of the major issues all tribes have in common. There is great diversity among the twelve tribal Nations of Montana in their languages, cultures, histories and governments. Each Nation has a distinct and unique cultural heritage that contributes to modern Montana. The seven Essential Understandings cover, but are not limited to:

- Reservations and Tribal Groups;
- Diversity of the American Indian;
- Ideologies of Native traditional beliefs and spirituality and oral histories;

- Lands reserved by the tribes;
- Federal Policy Periods;
- Indigenous perspectives of history; and
- Tribal Sovereignty.

Indian Education for All and the Essential Understandings are fundamental pieces of all curriculum efforts and initiatives at the state level. Indian Education for All and the Essential Understandings are integrated into the Montana Content Standards, as well as guiding documents and resources that have been and will be developed. School district curriculum must include the integration of Indian Education for All and the Essential Understandings. Therefore, when a district is reviewing instructional materials, Indian Education for All must be a key criterion of the review process. The instructional materials review team must have knowledge of Indian Education for All and the Essential Understandings. These individuals must possess this knowledge so as to review and evaluate instructional materials for:

- stereotypes, inaccuracies, omissions and biases about American Indians, and
- alignment to learning expectations for Indian Education outlined in the content standards.

The OPI publication, *Evaluating American Indian Materials & Resources for the Classroom Textbooks, Literature, DVDs, Videos, and Websites* include steps to evaluate how supplementary materials are used to effectively implement IEFA. Appendix A includes the Evaluation Form that can be found at http://www.opi.mt.gov/pdf/IndianEd/Resources/09Eval_Textbooks.pdf.

Another OPI publication, *The Frameworks: A Practical Guide for Montana Teachers and Administrators Implementing Indian Education for All*, Appendix D, Rubric for Evaluating Indian Education for All Curricula, Table 6. Evaluation Rubric, page 51 is a valuable tool when reviewing instructional materials for exemplary integration of Indian Education.

The Frameworks: A Practical Guide for Montana Teachers and Administrators Implementing Indian Education for All, Appendix D, Rubric for Evaluating Indian Education for All Curricula, Table 6

	0 Absent	1 Included	2 Integrated	3 Exemplary
Content	Native American content is not specified or included in lessons or curriculum.	Some, not specific or lacking resources	Tribally specific with resources identified	<p>a. Native American content is tribally specific.</p> <p>b. Included content is developmentally appropriate.</p> <p>c. Primary and authentic sources are identified.</p> <p>d. Overall, lessons balance historic and contemporary content.</p>
Best practices	Instructional best practices are not evident.	Some evident	Increased sophistication	<p>a. Lesson engages students in social construction of knowledge.</p> <p>b. Lessons activate and build background knowledge.</p> <p>c. Lessons require students to apply reading strategies to construct meaning.</p> <p>d. Unit requires students to write to represent their thinking.</p>
Essential Understandings	Essential Understandings are not utilized.	Implied	Identified	a. Lessons and curricula identify, and are aligned to, <i>Essential Understandings about Montana Indians</i> .
Presentation	Curriculum is sketchy, incomplete, and generally quite poorly presented.	Some development	More complete	<p>a. All essential lesson components are identified content area, grade level, unit summary, time requirements, <i>Essential Understandings</i>, state standards, student learning targets, complete resources citations.</p> <p>b. Lessons employ well-sequenced instructional design.</p> <p>c. Suggested support materials are identified.</p> <p>d. Formative and summative assessments are included.</p>
Bank's Approaches	Contributions	Additive	Transformation	Social Action

(Created by Hal Schmid, Julie Cajune, and Mary Jo Swartley with Aileen Plant, Jen Brander, Valerie Umphrey, Lynn Vanderburg, Pam Roderghiero, John Fleming, and Tim Marchant, with modifications by Tammy Elser, 2006)

Part 2: District Level Perspective and Process

Ultimately, no two districts are alike. The evaluation of the current reality in a district, done purposefully and intentionally, provides a lens through which instructional materials selection is viewed. This evaluation should address these questions using data: What do we do well in our district? Where do we struggle? What factors are most critical in our materials selection? Because of the unique characteristics of individual districts, instructional materials selection is a process that requires comprehensive knowledge of the district.

Consequently, it is essential to review the district goals and action plan outlined in the CSIP, Annual Progress Report and Title I reporting. The CSIP district goals and Annual Progress Report are driven by the curriculum and professional development needs as defined by the following Montana correlate categories: Academic Performance, Learning Environment, and Efficiency (http://www.opi.mt.gov/pdf/SSOS/SR/Correlates_1_9.pdf). A tool, based on the correlates, provides a method to prioritize each district’s needs. This tool can be found in Appendix B.

The instructional materials review team should use a comprehensive set of qualitative and quantitative data to identify the current landscape of the district. This information may include student achievement data, parent, teacher, and student surveys, behavior, attendance, and graduation rates. Equally important is the vertical articulation of the district curriculum, with particular focus on transition points across grade configurations. When selecting instructional materials, Identifying district needs and priorities, as well as ensuring the district curriculum is aligned and articulated, grounds individuals in the process of selecting instructional materials. Professional development needs of staff and available resources, in terms of facilities, equipment, and support staff must be considered. Connections to other content areas and requirements such as Indian Education for All also weigh into the equation. Identifying district needs and priorities is a comprehensive process; there are no shortcuts.

A Recommended Process for Effective Review, Selection and Implementation of Instructional Materials	
Leadership Team: Take the Lead and Organize	
System organization for data, roles, responsibilities, timelines, guiding principles, and process components	<p>1) Collect and analyze data</p> <ul style="list-style-type: none"> • Provide the rationale for initiating the selection and adoption process. Why are we doing this now? <p>A Montana Class B District conducting a mathematics instructional materials adoption communicated this information in the following way:</p>

	<div data-bbox="440 191 1349 701" style="border: 1px solid black; padding: 5px;"> <p>Givens</p> <ul style="list-style-type: none"> ❖ The Board is anxious for the district to make progress on improving students’ math achievement. <ul style="list-style-type: none"> ○ Continued status of not meeting AYP in math is unacceptable. ❖ Because research shows that a single, district-wide core program is more successful than multiple programs, one core program will be adopted in order to maximize student achievement. ❖ Only the adopted core program will be used by teachers at all relevant grade levels coupled with research-based best practices. ❖ The need for supplemental materials will be determined after one year of implementation </div> <ul style="list-style-type: none"> • Consider other on-going or anticipated initiatives in the district and their effect on the selection and adoption process. What other demands are there on staff that may impact their ability to engage in the selection and adoption process? • Review current district board policy for the selection and adoption of instructional and library materials and the relevant portions of Administrative Rules of Montana (10.55.1801) to ensure the planned activities are aligned with these requirements. • If no policy is in place to govern the selection and adoption of instructional materials, one should be developed (See the Montana School Boards Association sample policy 2120 MTSB Model Policies). • There may be a need to revise existing policy to reflect current circumstances. For example, the existing policy may refer to only print materials and not provide for the use of digital and non-print formats.
	<p>2) Define roles and responsibilities</p> <ul style="list-style-type: none"> • Determine the various groups that will be involved in the selection and adoption process. This should include individuals or a team that oversees the process and provides direction (i.e. a leadership team). The district superintendent or assistant superintendent, curriculum director or individual with this responsibility, business manager and other administrators, teacher leaders and/or community leaders are individuals who often comprise this oversight team. • A second group with responsibilities for reviewing the materials and making recommendations (i.e. selection committee) is needed. This group typically includes teachers, principals, parents, and specialists (library, special education, and English language learners).

- In a very small district, there will likely be only one group. If there is only one teacher with responsibilities for teaching a particular content, it is important to engage others in the process of reviewing materials and making recommendations for adoption. One individual should not have the sole responsibility for reviewing and making the selection recommendation. This can be accomplished by engaging other teachers in the district at the same grade level or connecting electronically with teachers with responsibilities for the same content who are in districts with similar demographics and characteristics.
- The following examples of roles and responsibilities are from a mathematics instructional materials selection and adoption process in a Montana Class A District:

Leadership Teams	
❖	Leadership Committee Members: District Superintendent, Assistant Superintendent, Curriculum Director, Business Manager
○	Responsibilities: <ul style="list-style-type: none"> ▪ Provide directions on the adoption process, and ▪ Develop implementation plan for adopted program.
❖	Mathematics Materials Review Team Members: teachers and principals
○	Responsibilities: <ul style="list-style-type: none"> ▪ Review and evaluate materials, ▪ Inform and solicit feedback from colleagues, ▪ Review relevant research, ▪ Analyze student assessment data, and ▪ Recommend programs for adoption.

	<p>3) Set timelines</p> <ul style="list-style-type: none"> • Ideally, an entire year should be devoted to the process of reviewing materials and thoughtfully planning for implementation. This allows the individuals who are responsible for examining and evaluating the materials sufficient time to complete the task. An important aspect of the instructional materials selection and review process is transparency – this requires time for communicating with all stakeholders and providing them with opportunities to be informed and involved. • If the process must be completed in less than a year, it is critical that sufficient time is devoted to the review of materials. There is no short-cut to this aspect of the process and if it cannot be done in a credible manner, the adoption should be delayed. • Appendix C is a timeline used by the Montana Class A district referenced above.
	<p>4) Establish guiding principles</p> <ul style="list-style-type: none"> • Identifying and communicating a set of guiding principles for the selection and adoption process provides an opportunity for the district leaders to establish clear direction. This set of guiding principles defines any ‘non-negotiables’ and should delineate the decision-making responsibilities of the various participants. • In addition to the guiding principles put forward by the leadership team, the group who will be reviewing, evaluating and recommending materials may also want to develop a set of guiding principles. • Appendix D includes the guiding principles used by the Montana Class A district cited above.
	<p>5) Develop a clear process</p> <ul style="list-style-type: none"> • <u>General Plan</u>: It is essential to provide an overview of the entire process from start to finish that will be used to review and select the instructional materials in advance of beginning the process. <p>For example, will an initial screening phase be used to examine all the possible options and then narrow the selection to a more limited number? In this approach, the instructional materials identified through the initial screening would then receive a more in-depth review.</p> <p>Appendix E is an example from a large district outside of Montana that provides a description and timeline for this type of approach.</p> <ul style="list-style-type: none"> • <u>Recruitment Plan</u>: Determine how the individuals who will participate in the process will be identified. Will there be a nomination process? If so, who nominates and who selects? If the approach is to recruit volunteers, will there be any criteria used for selecting among those volunteering? These criteria

should be determined and communicated in advance. Another approach is for the leadership team to specifically recruit/invite individuals to participate because of their particular knowledge, experience or perspective. Individuals will need to know if they will be compensated for their participation.

Another consideration in identifying members of the review team, is the participation of individuals who may have a particular perspective that may be counter to the one commonly held by the majority. If you want to use the selection and adoption process as an opportunity to have these various perspectives aired and discussed, then including these individuals makes sense. However, if you believe their participation could significantly disrupt or derail the adoption process, it may be better to use a different strategy to allow these perspectives to be heard.

- Implementation Considerations: Prior to beginning the review and selection process it is important to answer the following questions and to determine how these factors affect which programs can be considered:
 - What resources are available for professional development? What is feasible for initial training, during the implementation year, and in subsequent years during the life of the adoption?
 - Is a program with a large number of consumables appropriate? Will the budget allow for annually replacing the consumables?
 - Are technology upgrades possible, if needed?
- Obtaining Materials: Review MCA 20-7-603 – Montana code on textbook adoption. Vendors must be licensed with the Office of Public Instruction. Contact the Superintendent’s office for the current list of licensed vendors before beginning the process.

There are a variety of approaches to securing materials for review. Vendors can be invited to provide presentations on-site; samples of materials may be ordered for review; on-line review of materials may be possible; or examining materials at a state conference or resource fair is another option.

The best approach is to thoroughly examine the **entire set** of materials and any possible supplements -- either on-line or in hard copy.

- Plan for Piloting Materials: Will the materials be piloted as a part of the selection process? When making this decision consider the advantages and disadvantages of piloting materials. Although piloting can provide a ‘hands-on’ experience with the instructional materials it doesn’t portray an accurate picture of what’s involved for implementation. Piloting typically happens without any professional development, may only allow a little time for preparation and often doesn’t give consideration to how the piloted lesson or

	<p>unit fits into the full curriculum.</p> <p>If the decision is to pilot the materials, protocols and agreements for those who will be involved in the pilot must be established. In addition, consideration must be given to how the results of the pilot will be evaluated and communicated.</p> <ul style="list-style-type: none"> • <u>Review and Feedback by Others</u>: Another decision that should be made before beginning the evaluation and selection process is the involvement of others who will not be on the review committee. Will teachers, parents, community members, administrators, or students who are not officially a part of the review team have an opportunity to examine the materials? If so, what guidance will they be given? How will they communicate their opinions? How will this information be used? Knowing in advance the answers to these questions helps to set the stage for an open and transparent selection process. • <u>Communication Plan</u>: A critical component of any successful instructional materials selection process is frequent communication with all stakeholders. A method and timeline for keeping interested parties, who are not actively taking part in the review and selection of the materials, informed should be established before beginning the process. A useful strategy for communicating to others is a set of Talking Points that is developed and distributed on a regular schedule. An example of a set of Talking Points used by a district during their instructional materials selection process can be found in the Appendix F.
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Process: Building Background Knowledge

<p>Develop the team’s common understanding of state level expectations</p>	<p>1) Review state level expectations as described in Part 2: District Level Perspectives and Process. The Montana Content Standards and/or Montana Common Core Standards, adopted by the Board of Public Education, provide content oriented learning targets that are rigorous and consistent. The understanding of these standards provides a critical foundation to the selection process for instructional materials. For example, a science instructional materials adoption team looking at the first Grade 8 benchmark for Standard 3 <i>“compare the structure and function of prokaryotic cells (bacteria) and eukaryotic cells (plant, animal, etc.) including the levels of organization of the structure and function, particularly with humans”</i> would need to identify the agreed-upon specific cell structures, functions and levels of organization their students should know to meet this benchmark.</p>
	<p>2) CSIP and/or Title I reporting documents provide tailored and specific information about the district’s performance in relation to state expectations. This step in the process deepens understanding by linking state-wide targets to district-specific achievement and goals. The leadership team considers:</p>

	<ul style="list-style-type: none"> • Montana Correlates for Effective Schools • Proficiency levels as determined by the state AMO and/or growth levels • Five year curriculum cycle • Effectiveness of prior goals
<p>Analyze district level perspectives</p>	<p>3) With the common understanding obtained from review of the CSIP and Title 1 reporting documents, which are connected to state level expectations, the team moves into further analysis of district data. Specific needs are identified and prioritized. Data to consider include, but are not limited to:</p> <p>Quantitative data</p> <ul style="list-style-type: none"> • Academic achievement • Graduation rate • Attendance rate • Mobility • Behavior data <p>Qualitative data</p> <ul style="list-style-type: none"> • Student surveys • Staff surveys • Community input (focus groups)
	<p>4) Determine curriculum focus, needs, and goals based on analyzed data (e.g., expository writing in the early grades). This step ensures that a match can be made to appropriate textbooks/instructional materials. Additional considerations include:</p> <ul style="list-style-type: none"> • Review curriculum • Examine instructional practices (e.g., differentiation) • Examine current resources and expertise • Consider connections to other content areas and requirements, such as IEFA
<p>Take Action: Select of Materials</p>	
<p>Establish and apply criteria for examining and evaluating textbooks/materials</p>	<p>The team next decides upon procedural elements of the selection process. The creation of rubrics is essential for ensuring a match of materials to district needs. To keep the team on its timeline, these tasks must be organized and carried out by the curriculum leader.</p> <ol style="list-style-type: none"> 1) Set criteria based on curriculum focus, needs, and goals 2) Select or create rubrics for review by educators outside of the leadership team. Develop process for establishing inter-rater reliability. 3) Request documentation from publishers around specific claims. 4) Create a clear communication plan outlining the process and procedure 5) Ensure that materials are available to and evaluated by a broad representation of staff, community and students. Oftentimes larger

	<p>districts set a schedule for rotation of materials or host events where vendor representatives make formal presentations to staff. Smaller districts may view samples of up to five different textbooks/materials and then narrow their choices to two, at which point vendor representatives make presentations and the committee reaches consensus on one choice.</p> <p>6) Refer to Appendix I for Montana Code Annotated and Administrative Rules of Montana for textbooks and instructional materials.</p> <p>Two key documents with the resources, tools, rubrics, and essential criteria specific to standards-based materials are:</p> <ul style="list-style-type: none"> • The Common Core State Standards Mathematics Curriculum Materials Analysis Project mathematics curriculum analysis report - Google Search Appendix G • Publishers' Criteria for the Common Core State Standards in English Language Arts and Literacy, Grades K-2 and 3–12 publisher criteria for common core - Google Search Appendix H
Finalize the selection of instructional materials	<p>These final steps involve the narrowing of choices to the one that best fits district needs. Also included here are consensus building and procedural aspects for the curriculum leader to bring closure to the materials selection process.</p> <ol style="list-style-type: none"> 1) Consider the Montana Code Annotated sections involving textbook adoption. A list of registered vendor can be found in the OPI Directory of Montana Schools. http://www.opi.mt.gov/Resources/Directory/Index.html 2) Establish a consensus protocol (rationale for using consensus). Many times, groups do not reach 100% agreement. This is natural, but the team must agree upon consensus; this is often thought of as “what can we all live with.” Furthermore, district policy and procedure around the final decision should be clarified. In some places, the superintendent makes the final recommendation after considering input from the selection committee. Ensure that all stakeholders understand the district policy and that the board of trustees makes the final decision. 3) Negotiate with vendors the costs and obtain Request for Proposals (RFPs) if necessary to compile complete information about full costs of textbooks/materials. 4) Present case for approval as per district policy & procedure. In some districts, primary instructional materials must be approved by the school board, whereas supplemental and incidental resources do not require school board approval. Use textbook/materials selection rubric and district data to communicate rationale for textbook/materials selection. Have vendor representative available for unanticipated questions during board presentation. Bring at least one additional committee member to the presentation.

Appendix A: Evaluating American Indian Materials & Resources for the Classroom Textbooks, Literature, DVDs, Videos, and Websites

Evaluation Form

Evaluation of Classroom Materials

Title: _____

Writer or Producer: _____

Audiovisual: _____

Publisher or Website: _____ Fiction: _____ Non-

Fiction: _____

Published Date: _____ Age Level: ___ Children ___ Intermed ___ Second ___ Adult

1. Would this material help American Indians identify and be proud of Yes__ No__ N/A__ their heritage?

2. Would the materials encourage a negative image for the non-Indian Yes__ No__ N/A__ reader?

3. Are both sides of the issue, event or problem presented? Yes__ No__ N/A__

4. Are the facts correct? Yes__ No__ N/A__

5. Are American Indians stereotyped in this material:

- through the illustrations? Yes__ No__ N/A__

- through the content? Yes__ No__ N/A__

- through narrative or dialogue? Yes__ No__ N/A__

6. Are the contributions of American Indians to Western civilization Yes__ No__ N/A__ given accurate representation?

7. Would this material assist in establishing a positive image of Yes__ No__ N/A__ American Indians?

8. Considering the time period of setting of this material, do the Yes__ No__ N/A__

illustrations/situations authenticate an Indian way of life?

9. Does the material perpetuate the myths and misconceptions Yes__ No__ N/A__ about American Indians?

10. Is the author or producer American Indian, or was consultation with Yes__ No__ N/A__ American Indians or culture committees included in the creation of the material?

11. If the subject includes tribally specific or material, has it been approved Yes__ No__ N/A__ by a local culture committee or other tribal organization? Or has it had input from a tribal leader, elder or other qualified individual?

12. Could this material be used in a school classroom or library to increase Yes__ No__ N/A__ awareness and understanding of American Indians?

13. Does the content seem authentic and accurate? Yes__ No__ N/A__

14. Is the content well organized? Yes__ No__ N/A__

15. Does the material generalize about American Indians? Yes__ No__ N/A__

Appendix B: Montana Correlates of Effective Schools

Montana Correlates of Effective Schools 1-9

Academic Performance

Correlate 1: Curriculum

The school develops and implements a curriculum that is rigorous, intentional, and aligned to state standards.

Correlate 2: Assessment

The school utilizes multiple evaluation and assessment strategies to continuously monitor and modify instruction to meet student needs and support proficient student work.

Correlate 3: Instruction

The school's instructional program actively engages all students by using effective, varied, and research-based practices to improve student academic performance.

Learning Environment

Correlate 4: School Culture

The school/district functions as an effective learning community and supports a climate conducive to performance excellence.

Correlate 5: Student, Family, and Community Support

The school/district works with families and community groups to remove barriers to learning in an effort to meet the intellectual, social, career, and developmental needs of students.

Correlate 6: Professional Growth, Development, and Evaluation

The school/district provides research-based, results-driven professional development opportunities for staff and implements performance evaluation procedures in order to improve teaching and learning.

Efficiency

Correlate 7: Leadership

School/district instructional decisions focus on support for teaching and learning, organizational direction, high performance expectations, creating a learning culture, and developing leadership capacity.

Correlate 8: Organizational Structure and Resources

The organization of the school/district maximizes use of time, all available space and other resources to maximize teaching and learning, and supports high student and staff performance.

Correlate 9: Comprehensive and Effective Planning

The school/district develops, implements, and evaluates a comprehensive school improvement plan that communicates a clear purpose, direction, and action plan focused on teaching and learning.

Appendix C: Montana Class A School District Timeline

Mathematics Textbook Adoption Process and Timeline

Date	Action
September 8	<p>District Committee (DC) Meets.</p> <p>Review and provide feedback on proposed adoption plan and timeline</p> <p>Discuss long-term goals and plans for district mathematics program</p> <p>Determine guiding principles to identify candidate programs</p>
September 22	<p>DC Meets. 11:00 am - 2:00 pm</p> <p>Continue discussion of long term plan for district mathematics program and its relationship to adoption process</p> <p>Mathematics Leadership Team (MLT) Meets. 4:00 pm - 8:00 pm</p> <p>Introduction to process and timeline</p> <p>Begin developing selection criteria</p>
October 6	<p>MLT Meets. 4:00 pm – 6:00 pm</p> <p>Review relevant research and/or student assessment data</p>
September 23 – November 15	<p>Reporting and Feedback Gathering @ Sites</p> <p>Using <i>Talking Points</i> provided by Education Northwest, MLT members report to colleagues at individual sites and solicit feedback on adoption process and selection criteria</p>
November 16 - 17	<p>DC Meets. 11:00 am - 2:00 pm</p> <p>Continue work on long-term district mathematics plan</p> <p>Provide direction for MLT, as necessary</p> <p>MLT Meets. 4:00 pm - 8:00 pm</p> <p>Presentations by publisher representatives from candidate programs</p> <p>Finalize selection criteria and instrument</p> <p>Begin evaluation of candidate programs & calibrate instrument</p>
November 18 – January 4	<p>Reporting and Feedback Gathering @ Sites</p> <p>MLT members update colleagues using <i>Talking Points</i> provided by Education Northwest</p>

	Ongoing review of materials
December 15	MLT Meets. 4:00 pm –6:00 pm Review relevant research and/or student assessment data
January 5	DC Meets. 11:00 am - 2:00 pm Continue work on long-term district mathematics plan Provide direction for MLT, as necessary MLT Meets. 4:00 pm - 8:00 pm Complete calibration of the instrument Share feedback from colleagues Plan site visits piloting of lessons and identifying questions for publishers
January 6 – February 15	Reporting and Feedback Gathering @ Sites MLT members update colleagues using <i>Talking Points</i> provided by Education Northwest
February 16	DC Meets. 11:00 am - 2:00 pm Continue work on long term district mathematics plan Provide direction for MLT, as necessary MLT Meets. 4:00 pm - 8:00 pm Site visit reports Review external evaluations/research results describing candidate programs Share feedback from colleagues Complete evaluations of candidate programs
TBD	MLT Meets Examine feedback from reviews by others (this needs to be added because of the delay in beginning the process of program review by those outside of the MLT)
February 17 – March 11	Additional Data Gathering Conduct additional site visits and/or interviews with current users Pilot lessons from candidate programs Collect feedback from colleagues

March 16	DC Meets. 11:00 am - 2:00 pm Finalize long term district mathematics plan Provide direction for MLT, as necessary MLT Meets. 4:00 pm - 8:00 pm Consensus decision on final recommendations to Board
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Appendix D: Montana Class A School District Guiding Principles

Guiding Principles for Identification of Candidate Programs

⌘ Research-based

- ☑ Aligns with research on how children learn
- ☑ Developed using rigorous and accepted research & development procedures

⌘ Balanced approach

- ☑ Content and pedagogy appropriately address the various aspects of mathematics, including computation and problem-solving

Guiding Principles for Identification of Candidate Programs

⌘ Standards-based

- ☑ Closely aligned with national and state content and pedagogy standards

⌘ Aligned with state and district assessments

- ☑ Supports performance expectations of assessments, including cognitive complexity and depth of understanding

Guiding Principles for Identification of Candidate Programs

- ⌘ Body of quality, empirical evidence that substantiates positive impact on student learning
- ⌘ Culturally congruent with Native American Pedagogy

Therefore. . .

- ⌘ There will be a district-wide mathematics program, not piece-meal by school
- ⌘ The candidate programs are:
 - ☒ Grades K – 5: Everyday Math, Investigations, Math Trailblazers, Math Wings
 - ☒ Grades 6 – 8: Connected Math, Math in Context, MMAP, MathThematics (STEM), UCSMP
 - ☒ Grades 9 – 12: Core-Plus, IMP, Math Connections, SIMMS, UCSMP, Cognitive Tutor

Appendix E: Out-of-State Class AA School District Timeline

Date	Action
October 25	Adoption Committee (AC) Meets <ul style="list-style-type: none"> ▪ Establish group norms ▪ Review cultural competency principles and criteria ▪ Explore cognitive demand concepts
November 8 8:00 am – 3:30 pm	Adoption Committee Meets <ul style="list-style-type: none"> ▪ Review proposed plan for adoption process and timeline ▪ Understand Adoption Committee roles and responsibilities ▪ Examine district student assessment data ▪ Begin development of initial screening criteria, comprehensive evaluation criteria, and instrument (initial and comprehensive) formats
November 15	Education Northwest Prepares Draft Evaluation Instruments <ul style="list-style-type: none"> ▪ Send draft initial screening and comprehensive evaluation instruments to AC for review and sharing with colleagues
November 15 – 28	Reporting and Feedback Gathering @ Schools Using <i>Talking Points</i> provided by Education Northwest <ul style="list-style-type: none"> ▪ AC members report to colleagues at individual sites and solicit feedback ▪ Meeting with non-AC members ▪ AC principals share with other principals at cluster meetings ▪ <i>Talking Points</i> sent to non-AC schools
November 29	Feedback on Draft Initial Screening and Comprehensive Screening Instruments due to Education Northwest
December 1 - 5	Instructional Materials Committee Meets and Approves Initial Screening and Comprehensive Screening Instruments
December 6 4:00 pm – 7:00 pm	Adoption Committee Meets <ul style="list-style-type: none"> ▪ Training on use of initial screening instrument (elementary, middle and high school groups use instrument to evaluate one of the candidate programs) to ensure inter-rater reliability
December 7 - 12	Reporting and Feedback Gathering @ Schools Using <i>Talking Points</i> provided by Education Northwest <ul style="list-style-type: none"> ▪ AC members report to colleagues at individual sites and solicit feedback
December 13 4:00 pm – 7:00 pm	Adoption Committee Meets <ul style="list-style-type: none"> ▪ AC members use initial screening instrument to evaluate programs
January 2 – January 13	Reporting and Feedback Gathering @ Schools Using <i>Talking Points</i> provided by Education Northwest and Initial Screening, as needed <ul style="list-style-type: none"> ▪ AC members report to colleagues at individual sites and solicit feedback ▪ AC members work to complete initial screening of all programs
January 17 8:00 am – 3:30 pm	Adoption Committee Meets <ul style="list-style-type: none"> ▪ AC members reach consensus on finalist candidate programs based on findings from initial screening of all programs. ▪ AC members receive training on comprehensive evaluation instrument and use to evaluate one of the candidate programs

Date	Action
January 18 – February 14	Curriculum Open Houses and Reporting/Feedback Gathering @ Schools <ul style="list-style-type: none"> ▪ Opportunity for non-Adoption Committee teachers and others to review candidate programs ▪ AC members update colleagues using <i>Talking Points</i> provided by Education Northwest
January 24 4:00 pm – 7:00 pm	Adoption Committee Meets <ul style="list-style-type: none"> ▪ AC members plan site visits, pilot lessons, additional data collection as needed ▪ AC members work on comprehensive evaluations of candidate programs
January 25 – February 27	Site Visits and Continued Review of Materials <ul style="list-style-type: none"> ▪ AC members conduct site visits where candidate programs are in use, pilot lessons and/or collect additional data as determined in January 24 meeting ▪ AC members continue to collect additional feedback from colleagues, using <i>Talking Points</i> provided by Education Northwest ▪ AC members work on comprehensive evaluations of candidate programs, as needed
February 7 4:00 p.m. – 7:00 p.m.	Adoption Committee Meets <ul style="list-style-type: none"> ▪ Bill Schmidt presentation ▪ Meeting open to all SPS educators
February 28 4:00 pm – 7:00 pm	Adoption Committee Meets <ul style="list-style-type: none"> ▪ Education Northwest presents summary of research and external evaluations on candidate programs ▪ AC members report on site visits, pilot lessons and additional data collection activities ▪ Education Northwest provides summary of data from Curriculum Open Houses
March 7 8:00 am – 3:30 pm	Adoption Committee Meets <ul style="list-style-type: none"> ▪ AC members complete comprehensive evaluations of candidate programs members ▪ AC members begin consensus decision-making process
March 14 8:00 am – 3:30 pm	Adoption Committee Meets <ul style="list-style-type: none"> ▪ AC members make final decision and formulate recommendation for board approval ▪ AC members ensure articulation of recommended programs across K-12
March 21 4:00 pm – 7:00 pm	Adoption Committee Meets, if needed <ul style="list-style-type: none"> ▪ AC members complete 3/14 tasks as needed

Appendix F: Talking Points

K-12 Mathematics Instructional Materials Adoption Committee

TALKING POINTS from Education Northwest

November 8, 2005

- ❖ The K-12 Mathematics Instructional Materials Adoption Committee met on November 8, 2005. The Committee is comprised of teachers, instructional assistants, parents, instructional coaches, district specialists, and building and district administrators.
- ❖ Kit Peixotto, Director of the Education Northwest's Curriculum, Instruction and Assessment Program (kit.peixotto@educationnorthwest.org) will serve as the external facilitator of the Adoption Committee. Future meetings will be held on January 17, 18, 24; February 9, 28; March 7, 14.
- ❖ The Adoption Committee is responsible for: 1) reviewing and evaluating candidate materials, 2) informing and soliciting feedback from colleagues, 3) reviewing relevant research, and 4) recommending programs to be adopted.
- ❖ In addition to an in-depth examination and evaluation of each candidate program by the Adoption Committee members, the process includes opportunities for review by individuals who are not members of the Committee, consideration of data collected through district surveys, and an examination of research and evaluation studies relevant to the candidate programs.
- ❖ As an initial step in identifying the specific criteria that will be used in both the initial screening process and the final comprehensive evaluations, Committee members discussed and identified characteristics of mathematically powerful students. These characteristics then informed a brainstorming session in which potential initial and comprehensive selection criteria were proposed and prioritized.
- ❖ Using the ideas generated in the November 8 session, the NWREL facilitator prepared drafts of the Initial Screening Instrument and Comprehensive Evaluation Instrument for review and feedback by the Adoption Committee members. Feedback on these instruments is due on Thursday, January 5, 2006.

Adoption Committee members will receive training and develop inter-rater reliability on the Initial Screening Instrument at the January 17 – 18 meetings. Once a high-level of inter-rater reliability is established, Committee members will work to evaluate all the instructional materials submitted to the district for consideration. Finalist candidate programs will be identified at the January 24 meeting using a consensus decision process

Appendix G: Common Core State Standards Mathematics Curriculum Materials Analysis Project

The document includes an Overview, User’s Guide, Professional Development Facilitators Guide, and a Facilitator Guide PowerPoint Slides. The User’s Guide includes detailed description of three “Tools”.

- **Tool 1** provides information about the degree to which specific trajectories of mathematics topics are incorporated appropriately across grade-band curriculum materials.
- **Tool 2** focuses on the extent to which the Standards for Mathematical Practice are embedded and integrated in the curriculum materials.
- **Tool 3** focuses on the extent to which mathematics curriculum materials address overarching considerations related to equity, assessment, and technology.

To help reviewers capture this richness in the curriculum materials, two lenses are used: coverage and balance. **Coverage** refers to the degree to which the curriculum materials attend to the content of a particular standard. The Content Coverage Rubric reports the extent to which reviewers found the designated mathematics content areas listed in Tool 1. Reviewers must decide if (1) the mathematics content area was found, (2) major, some, or a few gaps were found, or (3) the mathematics content area was covered fully. A key consideration is how easily content gaps could be filled by the district, school, or teacher. For example, it might be relatively easy to provide practice on a particular skill that might be under-emphasized. Providing lessons to address development of a concept that is not addressed may be much more difficult.

Balance addresses the degree to which the mathematics content is developed with a balance between mathematical understanding and procedural skill in ways that are consistent with the standard. The rubric is designed to gather specific evidence regarding how the curriculum materials capture understanding and procedural skills as intended in the CCSSM.

Content Coverage Rubric (Cont):	Balance of Mathematical Understanding and Procedural Skills Rubric (Bal):
Not Found (N) - The mathematics content was not found.	Not Found (N) - The content was not found.
Low (L) - Major gaps in the mathematics content were found.	Low (L) - The content was not developed or developed superficially.
Marginal (M) - Gaps in the mathematics content, as described in the Standards, were found and these gaps may not be easily filled.	Marginal (M) - The content was found and focused primarily on procedural skills and minimally on mathematical understanding, or ignored procedural skills.
Acceptable (A) - Few gaps in the mathematics content, as described in the Standards, were found and these gaps may be easily filled.	Acceptable (A) -The content was developed with a balance of mathematical understanding and procedural skills consistent with the Standards, but the connections between the two were not developed.
High (H) - The mathematics content was fully formed as described in the Standards.	High (H) - The content was developed with a balance of mathematical understanding and procedural skills consistent with the Standards, and the connections between the two were developed.

Professional Development for Mathematics Teachers and Administrators CCSS Mathematics Curriculum Analysis Project

Goals of the Professional Development Sessions:

- To provide an overview of the CCSSM curriculum analysis tools for reviewers
- To acquaint participants with the processes and tools to be used in their reviews of curriculum materials
- To assist participants in using appropriate criteria in the selection of mathematics curriculum materials

Focus of the Professional Development Session:

To ensure that participants are familiar with the three tools to be used in analyzing mathematics curriculum materials:

- Tool 1—Mathematics Content Alignment
- Tool 2—Use of Mathematical Practices
- Tool 3—Overarching Issues

Professional Development Schedule of Activities

Session 1 (2 hours)

Activity 1-Introductions and Overview of Project

Activity 2-Common Core State Standards in Mathematics

Session 2 (1 hour)

Activity 3-Overview of Standards of Mathematics Practice

Session 3 (1 hour)

Activity 4: Using Tool 1

Session 4: (1 hour)

Activity 5: Using Tool 2

Session 5: (1.5 hours)

Activity 6: Using Tool 3

Appendix H: Publishers' Criteria for the Common Core State Standards in English Language Arts and Literacy

For K-2

I. Key Criteria for Reading Foundations

II. Key Criteria for Text Selections

III. Key Criteria for Questions and Tasks

For 3-12

I. Text Selection

1. Text Complexity
2. Range and Quality of Texts

II. Questions and Tasks

1. High-Quality Text-Dependent Questions and Tasks
2. Cultivating Students' Ability To Read Complex Texts Independently

III. Academic Vocabulary

IV. Writing to Sources and Research

1. Writing to Sources — a Key Task
2. Extensive Practice with Short, Focused Research Projects

The criteria for ELA materials in grades 3–12 have one additional section:

V. Additional Key Criteria for Student Reading, Writing, Listening, and Speaking

1. Reading Complex Texts with Fluency
2. Increasing Focus on Argument and Informative Writing
3. Engaging in Academic Discussions
4. Using Multimedia and Technology Skillfully
5. Covering the Most Significant Grammar and Language Conventions

Appendix I: Montana Code and Administrative Rules for Textbooks and Instructional Materials

Montana Code Annotated

20-7-601. Free textbook provisions. (1) The trustees of each district shall provide free textbooks to the public school pupils of the district. The trustees shall purchase such textbooks at the expense of the district and loan them to such pupils free of charge, subject to the textbook damage policy of the trustees.

(2) For the purpose of this section only, textbooks shall not include those books or manuals which are rendered unusable as a result of having pages designed to be written upon or removed during the course of the study they serve. When the parents of a pupil attending a school of the district so request, such textbooks shall be sold to them at cost.

History: En. 75-7602 by Sec. 394, Ch. 5, L. 1971; R.C.M. 1947, 75-7602.

20-7-602. Textbook selection and adoption. (1) Textbooks must be selected by the district superintendent or by the school principal if there is no district superintendent. The selections are subject to the approval of the trustees. In districts not employing a district superintendent or principal, the trustees shall select and adopt the textbooks on the basis of recommendations of the county superintendent.

(2) In selecting textbooks, the district shall ensure that the materials are made available to each blind or visually impaired child in a timely manner in accordance with the requirements of the Individuals With Disabilities Education Act, 20 U.S.C. 1400, et seq.

History: En. 75-7603 by Sec. 395, Ch. 5, L. 1971; R.C.M. 1947, 75-7603; amd. Sec. 7, Ch. 490, L. 2005.

20-7-603. Textbooks obtained from licensed textbook dealer. Textbooks selected and adopted by districts shall be obtained from a licensed textbook dealer.

History: En. 75-7604 by Sec. 396, Ch. 5, L. 1971; amd. Sec. 1, Ch. 89, L. 1973; R.C.M. 1947, 75-7604.

20-7-604. Licensing textbook dealers. (1) Textbook dealers must be licensed to sell textbooks by the superintendent of public instruction. To obtain a license, a textbook dealer shall first file with the superintendent of public instruction the dealer's written agreement to:

(a) guarantee that textbooks must be supplied to any district at the listed, uniform sales prices in effect for schools, except that the prices may be reduced in accordance with this section;

(b) guarantee that at no time will any textbook sale price in Montana be a larger amount than the sale price to schools anywhere else in the United States under similar conditions of transportation and marketing; and

(c) reduce automatically the listed, uniform sales price to schools whenever reductions of these prices are made anywhere in the United States.

(2) Textbook dealers filing the written agreement with the superintendent of public instruction shall

also file a surety bond with the secretary of state. The surety bond must run to the state of Montana and be conditioned on the faithful performance of all duties imposed upon textbook dealers for the purpose of regulating the supply of textbooks to districts. The amount of the surety bond must be set by the superintendent of public instruction and may not be less than \$2,000 or more than \$10,000. It is the responsibility of the textbook dealer to maintain the surety bond on a current basis.

(3) When the textbook dealer has complied with the written agreement and surety bond requirements for licensing, the superintendent of public instruction shall issue a license to the textbook dealer.

History: En. 75-7605 by Sec. 397, Ch. 5, L. 1971; amd. Sec. 2, Ch. 89, L. 1973; R.C.M. 1947, 75-7605; amd. Sec. 7, Ch. 94, L. 2007.

20-7-605. Notification and processing of complaint against licensed textbook dealer. (1) A district or county superintendent shall notify the superintendent of public instruction whenever it is ascertained that a licensed textbook dealer is:

(a) offering to sell textbooks at a higher price than the listed uniform sales price filed with the superintendent of public instruction;

(b) offering to sell textbooks at a higher shipping point price than the shipping point price of the same textbooks distributed elsewhere in the United States; or

(c) in any other way performing contrary to the laws regulating the offering of textbooks for sale or adoption to districts.

(2) Upon receipt of such notification from the district or county superintendent, the superintendent of public instruction shall notify the appropriate licensed textbook dealer of the complaint. If the superintendent of public instruction finds that the licensed textbook dealer has violated any provision of this section and the dealer fails to rectify the error within 30 days of the notification of the finding of a violation, the dealer shall forfeit the dealer's surety bond. The attorney general, upon written request of the superintendent of public instruction, shall proceed to collect by legal action the full amount of the surety bond. Any amount recovered must be paid into the state general fund.

History: En. 75-7607 by Sec. 399, Ch. 5, L. 1971; amd. Sec. 3, Ch. 89, L. 1973; amd. Sec. 25, Ch. 266, L. 1977; R.C.M. 1947, 75-7607; amd. Sec. 31, Ch. 509, L. 1995.

20-7-606. Doing business without textbook dealer's license -- penalty. A textbook dealer who sells or offers for sale or adoption a textbook to any district or county superintendent without first obtaining a textbook license from the superintendent of public instruction shall be guilty of a misdemeanor. Upon conviction of the misdemeanor, the person shall be fined not less than \$500 or more than \$2,000.

History: En. 75-7608 by Sec. 400, Ch. 5, L. 1971; R.C.M. 1947, 75-7608; amd. Sec. 307, Ch. 56, L. 2009.

20-7-607. Restricting competition -- penalty. At any time a licensed textbook dealer enters into any understanding, agreement, or combination to control textbook prices or otherwise restrict competition in the sale of textbooks, the dealer shall forfeit the dealer's surety bond and license. The attorney

general shall institute and prosecute legal proceedings for the forfeiture of the surety bond of the licensed textbook dealer and for revocation of the dealer's license.

History: En. 75-7609 by Sec. 401, Ch. 5, L. 1971; R.C.M. 1947, 75-7609; amd. Sec. 308, Ch. 56, L. 2009.

20-7-608. Offer or acceptance of emoluments or other inducements -- penalty. (1) A textbook dealer or the dealer's agent may not offer any emolument or other inducement to any trustee or school employee to influence the selection, adoption, or purchase of textbooks.

(2) A trustee, county superintendent, or school employee may not accept any emolument or other inducement from a textbook dealer or agent of the dealer for the use of the official's or employee's influence in the selection, adoption, or purchase of textbooks.

(3) The violation of any provisions of this section is a misdemeanor. In addition, any trustee, county superintendent, or school employee convicted of the misdemeanor must be removed from the officer's or employee's position.

(4) This section may not be construed to prevent the supplying of a necessary number of sample textbooks for the purpose of examination by school officials or school employees.

History: En. 75-7610 by Sec. 402, Ch. 5, L. 1971; R.C.M. 1947, 75-7610; amd. Sec. 309, Ch. 56, L. 2009.

Administrative Rules of Montana

10.55.802 OPPORTUNITY AND EDUCATIONAL EQUITY

(1) It is the purpose of the accreditation standards to guarantee equality of educational opportunity to each person regardless of sex, race, marital status, national origin, or physical or mental disability. This includes programs, facilities, textbooks, curriculum, counseling, library services, and extracurricular activities.

History: [20-2-114](#), MCA; [IMP](#), [20-2-121](#), MCA; [NEW](#), 1989 MAR p. 342, Eff. 7/1/89; [AMD](#), 1994 MAR p. 166, Eff. 1/28/94; [AMD](#), 2000 MAR p. 3340, Eff. 12/8/00.