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POLICY 8.122

4-A I recommend that the Board adopt the proposed revised Policy 8.122, entitled "Textbooks and Related Instructional Materials."

[Contact: Meezie Pierce, PX 45114.]

Adoption

CONSENT ITEM

- The Board approved development of this revised Policy at the development reading on February 4, 2009.
- Pursuant to the Board's request at the February 4, 2009 meeting, language was added to lines 70 and 75 to allow the District to maintain allocation flexibility.
- The proposed revision modifies current policy provisions concerning District Materials Adoption Committees and their organizational makeup.
- It also sets forth the materials selection and adoption procedures.
- The revision updates the requisition and allocation practices for instructional materials in compliance with Florida Statutes.
- These changes will replace Directive 8.123.

POLICY 8.122

TEXTBOOKS AND RELATED INSTRUCTIONAL MATERIALS

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- 1. Adequate Instructional Materials.-- The School Board will provide adequate textbooks and other instructional materials in accordance with State law and State Board of Educational Rules. Instructional materials, as defined by Fla. Stat. § 1006.29(4), are "items having intellectual content that by design serve as a major tool for assisting in the instruction of a subject or course. These items may be available in bound, unbound, kit, or package form and may consist of hard backed or soft backed textbooks, consumables, learning laboratories, manipulatives, electronic media, and computer courseware or software. The term does not include electronic or computer hardware even if such hardware is bundled with software or other electronic media, nor does it include equipment or supplies."
- 13a.As stated in Fla. Stat. § 1006.28(1), "The term 'adequate instructional14materials' means a sufficient number of textbooks or sets of materials serving15as the basis for instruction for each student in the core courses of16mathematics, language arts, social studies, science, reading, and literature,17except for instruction for which the school advisory council approves the use of18a program that does not include a textbook as a major tool of instruction."
- 19 b. Pursuant to Fla. Stat. § 1006.37 (1), the Superintendent or designee shall 20 requisition State adopted instructional materials from the depository of the 21 publisher with whom a State contract has been made. The Superintendent or 22 designee shall "requisition current instructional materials to provide each 23 student with a textbook or other materials as a major tool of instruction in core 24 courses of the subject areas specified in [Fla. Stat.] §1006.40(2). These 25 materials must be requisitioned within the first 2 years after the adoption cycle, 26 except for materials related to growth of student membership or instructional 27 materials maintenance needs", but this requirement may be waived as provided by State law. 28
- The Superintendent or Board may determine when to waive the requirement of
 providing a textbook and/or other instructional material to each student in non core courses. In cases where the Superintendent makes the determination to
 waive the requirement, the Board shall be informed at the next Board meeting.
- c. Any decision by a school to use class sets or not to issue textbooks or other
 instructional materials that are provided by the District on a one-per-student
 basis shall be communicated to parents and area superintendents. In all
 instances, District curricular staff and school staff shall ensure that students
 have adequate materials for both in-class study and homework arrangements
 assignments.

- 39d.Instructional materials used in non-core courses may be purchased as class40sets if the materials are intended to be used as reference materials for in-class41use.
- 42 2. Allocation.-- The annual allocation and expenditure of State funds for textbooks
 43 and the annual purchase of State adopted or non-State adopted materials shall be
 44 in accordance with Chapter 1006, Part I.F, Florida Statutes, and applicable State
 45 Board of Education Rules.
- 46a.Use of State Instructional Materials Allocation.-- Absent a waiver from the47DOE or any applicable exemption under charter district status, only up to fifty48percent (50%) of the State allocation for textbooks may be used for the49purchase of instructional materials (including library and reference books and50non-print materials) not on the State-adopted list and for repair and renovation51of textbooks and library books, pursuant to Fla. Stat. § 1006.40(3)(b).
- 52 As stated in Fla. Stat. § 1006.40(3)(c), the District may use up to 100 percent b. 53 of that portion of the annual allocation designated for the purchase of instructional materials for kindergarten, and 75 percent of that portion 54 55 designated for the purchase of instructional materials for first grade, to purchase materials not on the State-adopted list. Any portion of State 56 57 allocated funds for textbooks not expended for textbooks or not otherwise 58 designated by legislative authority for library/media materials shall may be 59 expended on library and reference books and for the repair and renovation of textbooks and library books. However, of the amount not otherwise earmarked 60 61 for library/media materials or for book repair, expenditures may be made for 62 non-state adopted materials with the approval of the Superintendent or designee, pursuant to established procedures issued annually by bulletin. 63
- 64 Pursuant to procedures issued by bulletin annually, school centers and other 65 appropriate textbook users may requisition textbooks and ancillary 66 instructional materials prior to June 30 in accordance with prevailing statutory 67 law and State Board rules. Any request from a school center for use of the 68 state or local District allocation must be in accordance with state law and this 69 Policy.
- 70c.To the extent required by Fla. Stat. §1006.40 (7), in any year in which the total71instructional materials allocation for the District, including the portion72designated for library media materials and science laboratory supplies, has not73been expended or obligated prior to June 30, the School Board shall carry74forward the unobligated amount and shall add it to the next year's allocation,75but the District maintains flexibility with this provision if allowed by statute.
- 76d.Pursuant to Fla. Stat. §1006.40 (6),the District may issue purchase orders for77instructional materials needed for the next school year subsequent to February

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- 781 in an aggregate amount which does not exceed 20 percent of the current79year's allocation, and subsequent to April 1 in an aggregate amount which80does not exceed 90 percent of the current year's allocation, for the purpose of81expediting the delivery of materials to be paid for from the ensuing year's82allocation.
- e. <u>A portion of the State instructional materials allocation will be distributed by the</u>
 <u>Accounting Services Department to charter schools based on each school's</u>
 <u>unweighted FTE count.</u> The allocation is to be used for the purchase of
 <u>instructional materials and library materials that each charter school selects to</u>
 <u>best meet the curricular needs of its students and teachers.</u>
- 88 3. Selection. Adoption and Continued Use of Instructional Materials.--89 Instructional Materials selected for specific courses and grade levels as part of the 90 District's curriculum shall have been reviewed by a School or District Instructional 91 Materials Committee and approved by appropriate instructional personnel. 92 Committees shall reflect prevailing appropriate state guidelines. The Board believes that the selection of instructional materials is within its jurisdiction in 93 94 accordance with Fla. Stat. §1006.28 and pursuant to relevant statutes and 95 constitutional law. The Superintendent, through his/her designee, is required to provide for an evaluation of any instructional materials to be requisitioned that have 96 97 not been used previously in the District's schools. The procedures outlined in this 98 policy shall be used to evaluate and recommend instructional materials that are to 99 be considered for District adoption, subject to administrative review as stated in this 100 policy.
- a. <u>Composition of District Instructional Materials Adoption Committees</u>
- 102 i. The District will create instructional materials adoption committees based 103 on subjects being reviewed annually. Committees must have a minimum 104 of three members, but may have as many additional members as the 105 Superintendent or designee appoints. District committees will generally, 106 except as stated below, consist of six to twelve members. A member of a 107 State adoption committee may not serve on the District committee. Teacher members must be certified in and teaching in the subject area 108 109 being reviewed.
- 110 Elementary core subject adoption committees will be comprised of up to ii. 111 24 voting members. Secondary adoption committees will be comprised of 112 between three and twelve members. At least two-thirds of each District 113 committee must be composed of teachers who are currently teaching and 114 are certified to teach in the area(s) or subject(s) and appropriate grade 115 levels being reviewed. District or area subject specialists or resource teachers and lay members make up the remaining third of the voting 116 117 committee membership.

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- 118iii.Community representation on District adoption committees is
encouraged. Lay citizens are Palm Beach County residents who are not
professionally connected with education, such as professional or
educational consultants. Lay citizens selected to serve on adoption
committees may be any resident of Palm Beach County, or adult student
or parent of a child attending public school in Palm Beach County or
School Advisory Council members.
- 125 Area and/or District curricular staff members who have taught in the iv. subject area being reviewed may serve as facilitators on District adoption 126 127 committees to provide subject matter expertise and communicate the 128 district's curricular vision and goals to committee members. They may 129 assist in the review process and the correlation of publisher submissions 130 with course and subject instructional objectives. Representatives from 131 the Exceptional Student Education Department, the Multicultural Education Department, and the Educational Technology Department, or 132 133 other appropriate District departments may also serve as facilitators on 134 District adoption committees.
- 135 Teacher, specialist and lay citizen committee members will be appointed ٧. from nominations submitted by principals and/or District curricular staff. 136 137 Nominations must be submitted on a completed School District of Palm 138 Beach County form entitled "Teacher or Layperson Nomination for 139 Instructional Materials Adoption Committee" (PBSD 2181). A copy of the 140 form is available on the District's Records Management Department's 141 currently located web page at 142 http://www.palmbeach.k12.fl.us/Records/PDF/2181.pdf and in the District's Instructional Materials Department. The form is incorporated 143 144 herein by reference as part of this policy.
- 145vi.The membership of each committee should reflect the broad racial,
ethnic, socioeconomic and cultural diversity of the District including a
balanced representation from the various geographic regions and be
representative of students of diverse learning styles and ability levels.149School representation will be rotated with each adoption.
- 150 b. <u>District Adoption Procedures:</u>
- i. The District adoption cycle for instructional materials shall coincide with
 the State cycle except where a separate District adoption is deemed
 necessary. Adopted materials shall be used during the adoption cycle
 until physically unsuitable, or until replaced with newly-adopted materials,
 or until the course is no longer offered.
- 156 ii. <u>The District review will focus on evaluating materials that are submitted</u>

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- 157by publishers for State adoption or other materials available at the time158from appropriate publishers with a goal of recommending the most159suitable materials for District adoption in Palm Beach County.
- 160 iii. In the selection of instructional materials to be used in the District, the 161 standards used to determine the propriety of the materials shall include: 162 age appropriateness, educational purpose to be served by the materials, 163 degree to which the materials encompass the State and District school board performance standards provided for in Fla. Stat. § 1001.03(1), the 164 165 inclusion of instructional objectives contained within the curriculum 166 frameworks by the State Board of Education, the degree to which the 167 materials would be supplemented and explained by mature classroom instruction, and a consideration of the broad racial, ethnic, 168 169 socioeconomic, and cultural diversity of the students of the District. No 170 book or materials that contain hard-core pornography or are otherwise prohibited by Fla. Stat. §§ 847.012 and/or 847.0133 shall be 171 172 recommended for use in District schools.
- 173 iv. For District-wide adoptions in core subject areas, some teachers who teach that subject at the appropriate grade level and who are not on the 174 District committee will be afforded opportunities to voluntarily review 175 176 samples of the top two or three rated publishers' programs and give input 177 to the District committee unless only one (1) submission is deemed 178 acceptable by the District committee. Teachers' comments from the 179 review opportunities will be presented to the District committee and will be 180 weighed by the committee as a factor in its final decision-making process.
- 181v.District committees will be convened for the initial review of publisher's
submissions during the summer months whenever possible.183Reconvening committees will meet for one to two days during the fall to
make final recommendations to administration.
- 185 Each member of any District instructional materials adoption committee vi. 186 must sign an affidavit declaring no conflict of interest before transacting 187 the business of the committee. A copy of the form for the affidavit (PBSD 188 2290) may be found on the District's Division of Curriculum, Department currentlv 189 <u>of</u> Instructional Material's web page at: 190 http://www.palmbeach.k12.fl.us/instructionalmaterialsdept/adoptions.htm 191 (under Affidavit) and on the District's Records Management 192 Department's web page currently at: 193 http://www.palmbeach.k12.fl.us/Records/PDF/2290.pdf, and is 194 incorporated herein by reference as part of this policy.
- 195vii.Members of any District instructional materials adoption committee will196receive instructions that they are prohibited from accepting gifts, money,

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- 197emoluments, or other valuables which shall directly or indirectly influence198the adoption or purchase of any instructional materials. These199prohibitions apply to committee members. Committee members shall200conduct themselves in the best interest of students in support of the201district's mission statement.
- 202 viii. Each District adoption committee member will receive instruction and 203 training in the evaluation techniques to be used, characteristics of 204 effective instructional materials and the skills necessary to make valid, 205 culturally sensitive, and objective decisions regarding the content and rigor of instructional materials. In addition to conducting Topic 206 207 Comparisons, Horizontal Traces, and Vertical Traces where appropriate, 208 the review process will include scrutiny of each program's correlation to 209 the Sunshine State Standards or subsequent Standards adopted by the 210 State Board of Education and the assessments that are based on the 211 standards.
- 212ix.District committee meetings will be open to the public. Public notification213of adoption committee meeting dates and times will provided to the Public214Affairs Office.
- 215 The District prohibits the publishers, manufacturers, or representatives of х. instructional materials submitted for District adoption from communicating 216 217 directly with voting members during the process of the review and during the time teachers are reviewing materials. All contact must be made 218 219 through the District instructional materials specialist. Publishers should 220 not be denied answers to questions and should be advised of the procedures and all related information. If a committee elects to have 221 publisher presentations, every publisher submitting materials for 222 223 consideration in that specific subject area will be provided an equal 224 opportunity to present in the same amount of time provided to any and all 225 other publishers. Committee members are prohibited from discussing 226 matters relating to the instructional materials submitted for adoption with 227 agents or representatives of a publisher either directly or indirectly except 228 during committee meetings where presentations are made. Publishers 229 are expected to abide by the Notification to Publishers or Manufacturers 230 of Instructional Materials for guidelines governing District adoptions. A 231 copy of the Notice is available on the District's Division of Curriculum, 232 Department of Instructional Material's web page currently at: 233 http://www.palmbeach.k12.fl.us/instructionalmaterialsdept/documents/NO 234 TIFICATION%20TO%20PUBLISHERS.pdf and the Notice is attached 235 herein by reference as part of this policy.
- 236xi.Materials submitted for possible adoption will be evaluated fairly by
committee members using pre-established criteria and the same

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238 239 240		evaluation instrument. Publishers will be given written notification of any special conditions for participation in the District's adoption process as determined by Curriculum Division staff.
241 242		xii. <u>Interim reviews may be conducted as necessary and are arranged by the</u> <u>District instructional materials specialist.</u>
243 244 245 246		xiii. For committees meeting outside of teacher contract hours, teachers shall be paid at the appropriate hourly rate. For committees meetings during teacher contract hours, the District will provide funding for substitute teachers Lay members will serve on a volunteer basis.
247 248 249 250 251 252 253 254 255 256		xiv. The Committees may make recommendations for District adoption. All committee recommendations must be reviewed by appropriate District administrative staff who will review the appropriateness of the materials to ensure that they meet District curricular objectives. Subsequent to District administrative review and approval, the final District committee recommendations, along with any citizen comments, will be forwarded by the Assistant Superintendent for Curriculum to the Superintendent for review and approval based on findings of the appropriateness of the materials. If approved by the Superintendent, the recommendations are submitted to the School Board for final approval and adoption.
257 258 259 260 261 262 263		xv. Any request from a school center to use textbooks or other related instructional materials as part of the curriculum and which are not District adopted, per se, must be approved by the Superintendent or designee <u>based on the appropriateness of the materials to meet District curricular</u> <u>objectives.</u> Any request for funding of such materials must be approved by the Superintendent or designee. Specific procedures and authorization will be issued annually.
264 265 266 267 268	C.	Inventories Annual textbook inventories of District-adopted instructional materials shall be issued to schools and appropriate departments which posted on the District's web page currently located at: http://www.palmbeach.k12.fl.us/onlinereporting . The online inventory report shall serve as:
269 270		i. the official District adoption listing of materials used in the District's curriculum;
271 272		ii. the inventory/summary of all curricular instructional materials for which a school center/department is responsible; and
273 274		iii. <u>a guide</u> for <u>determining</u> the following school year's needs as provided by instructions/procedures issued annually.

- Disposal.-- The District Textbook Depository Instructional Materials Department shall arrange for the exchange of books among the various Districts in accordance with state law or rule and shall maintain a public lending or "give-away" program for disposal of obsolete or physically unsuitable materials or those no longer on State contract, as stated in Fla. Stat. § 1006.41, and no longer on the District's local adoption list or otherwise still officially in use in the District, as follows:
- 281a.Giving or lending the materials to other public education programs within the
District or State, to Charter schools in the District or State, to the teachers to
use in developing supplementary teaching materials, to students or others
(including the general public or foreign countries), or to any charitable
organization, governmental agency, home education students, private school,
or State; or
- b. Selling the materials to used book dealers, recycling plants, pulp mills, or other
 persons, firms, or corporations upon such terms as are most economically
 advantageous to the District School Board.
- c. <u>Pursuant to Fla. Stat. § 1006.41(3)</u>, all monies received by reason of sale,
 exchange or other disposition of instructional materials shall be deposited in
 the District school fund and added to the District appropriation for instructional
 materials.
- 294d.In the event that any instructional materials cannot be disposed of as provided295in subsections (a) or (b), the materials may be destroyed, using any296reasonable and safe method.
- 5. This policy will be periodically revised as necessary to keep it current with the State law and rules which it supplements, although appropriate staff should be familiar with Fla. Stat. Ch. 1006, Part I.F, as this Policy is not intended to reproduce all the details set forth in the law. The Superintendent may also issue bulletins to inform personnel of detailed internal procedures and new developments from the DOE related to the subject of this Policy. consistent with the standards of this policy.
- 303 STATUTORY AUTHORITY: Fla. Stat. §§ 1001.32(2); 1001.41(2); 1001.42 (22)
- 304 LAWS IMPLEMENTED: Fla. Stat. §§ 1001.32(2); 1006.28; 1006.29; 1006.37; 1006.40; 305 1006.41
- 306 HISTORY: 12/9/86; 11/17/99; 3/24/03; __/_/09

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Legal Signoff:

The Legal Department has reviewed proposed Policy 8.122 and finds it legally sufficient for development by the Board.

Attorney

Date

SCHOOL DISTRICT OF PALM BEACH COUNTY, FLORIDA

Notification to Publishers or Manufacturers of Instructional Materials

The following standards govern district instructional materials adoptions in Palm Beach District Schools:

- 1. Publishers or manufacturers of instructional materials who have submitted, or plan to submit within 18 months, instructional materials within a specific content area for consideration in the adoption process in the State of Florida or Palm Beach District Schools, **may not**:
 - a. directly contact any teacher(s), including department heads, in regard to their materials until after the School District of Palm Beach County makes its own official district adoption. (NOTE: The adoption becomes official only after it has been voted on by The School Board of Palm Beach County, Florida.);
 - b. host dinners, retreats or parties of any kind for any teacher(s) or administrator(s) in Palm Beach District Schools to showcase their materials being considered for adoption, other than showcases that are required by the District and scheduled to take place on School District property with the option of refreshments being arranged through the Palm Beach District Schools Food Service Department, and limited to a cost of no more than \$5.00 per person;
 - c. offer gifts, gift certificates or other enticements (such as "freebies") to any teacher(s) or administrator(s) (or their schools) who attend an event such as is described in **b**. above.

(The provisions in section 1 a., b., and c. would not prohibit teachers or administrators from participating in meetings of professional organizations where vendors may be a sponsor.)

- 2. All communication with schools, whether written or oral, regarding an adoption in Palm Beach District Schools must be handled through the Assistant Superintendent for Curriculum, or designee.
- 3. Blanket sampling of schools prior to district adoption of materials is prohibited. Arrangements for distribution to schools of evaluation copies of materials recommended for teacher review and voting must be handled though the Assistant Superintendent for Curriculum and Learning Support or designee.
- 4. Pilot programs of materials being considered for adoption during or outside the 18 months prior to their official adoption date of April 1st of the adoption year, are prohibited unless written authority is given by the Superintendent of Schools.
- 5. No member of the Palm Beach School District Instructional Materials Adoption Committees may discuss matters relating to instructional materials submitted for adoption with any agent of a publisher or manufacturer of instructional materials, either directly or indirectly, except during the period when the committee shall have been called into session for the purpose of evaluating instructional materials submitted for adoption OR in a public presentation showcasing the materials as described in number 1.b. above. Such discussions shall be limited to official meetings of the committee or in a public presentation (on Palm Beach District Schools' property) showcasing the materials as described in number 1.b. above.

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6. During the process of selection of any instructional materials, teachers and administrators in the district shall be governed by the law concerning ethics applicable to their position, including but not limited to the "Code of Ethics for Public Employees - Instructional Materials" within Florida Statutes Section 112.313.

No further notification will be sent to publishers; however, any agent of a publisher or manufacturer of instructional materials found in violation of these rules for the adoption process in Palm Beach District Schools may have their materials immediately disqualified from further consideration, absent extenuating circumstances.



THE SCHOOL DISTRICT OF PALM BEACH COUNTY

Teacher or Layperson Nomination for Instructional Materials Adoption Committee

The purpose of this form is to provide a school principal/designee the opportunity to nominate a teacher or layperson to the District Instructional Materials Adoption Committee. This recommendation form is to be completed by the <u>principal/designee</u> (named below). Fax completed recommendation to 684-5107 (PX 45107) or email to William Purtell, Instructional Materials Coordinator at purtellb@palmbeach.k12.fl.us.

School Type (check one only) High Sch	ool 🔲 Middle Sch	ool 📋 El	ementary		
SCHOOL			PRINCIPAL	DESIGNEE	
Nominee Type (<i>check one only</i>) Teacher	Layperson		_		
NAME	D (AYTIME TELEPHC)	• •	HOME TELEPHONE	-
ADDRESS (street, city, zip code)					
ADOPTION SUBJECT (EX: Foreign Language, Math, Science, etc.)	E-MAIL ADDRESS				

TEACHER EXPERIENCE AND QUALIFICATIONS (teacher nominees only)

If you are nominating a teacher to serve for more than one course/grade level because he/she has experience teaching multiple courses under consideration, rank them in order of preference with 1 being the highest.

Preference #	Course/Grade Level	Preference #	Course/Grade Level
			· · · · · · · · · · · · · · · · · · ·
]	

Number of years of teaching experience

Courses/grade levels taught

Past/Current teaching assignment

Related Professional Qualifications (if any):

Other qualifications

AYPE	RSON EXPERIENCE AND QUALIFICATIONS (layperson nominees only)
ls th	ne layperson available for all required dates? 🗌 Yes 🗌 No
Whi	ch of the following categories applies to this layperson? (check all that apply)
	SAC Member 🛛 Parent 🗌 PTA 🔲 Business Partner 🗍 Volunteer
Has	this layperson ever worked for the School District of Palm Beach County? 🛛 Yes 🗌 No
	es this layperson write, publish, or sell educational materials, or are they related to anyone who works for a lishing company? Yes No
	this person ever had an opportunity to represent the general public during a materials adoption? \Box Yes \Box No



THE SCHOOL DISTRICT OF PALM BEACH COUNTY

Instructional Materials Committee Member Affidavit

SUBJECT AREA COMMITTEE		
MEMBER'S CLASSIFICATION (Check Appropriate Box)		
Classroom Teacher	School Board Member	Lay Citizen
I hereby swear or affirm:		
• that I will faithfully discharge the duties imposed upon	me as a member of the Distr	ict Instructional
Materials Committee;		
 that I have no interest and that while a member of the 	Committee I will assume no	interest as

- that I have no interest and that, while a member of the Committee, I will assume no interest as author, as associate author, as publisher, or as representative of a publisher or manufacturer of any instructional materials;
- that I am in no way connected with the distribution of such materials;
- that I am not pecuniarily interested and that, while a member of the Committee, I will assume no
 pecuniary interest directly or indirectly in the business or profits of any person, firm, or corporation
 engaged in manufacturing, publishing or selling instructional materials designed for use in classroom
 teaching;
- that I will not accept any emolument or promise of future reward of any kind from any publisher or manufacturer of instructional materials, his agent, or anyone interested in or intending to bias my judgment in any way in the selection of instructional materials to be adopted.

Under penalties of perjury, I declare that I have read the foregoing affidavit and that the facts stated in it are true.

Signature of Member

Date

Member's Printed Name

PBSD 2290 (Rev. 12/4/2008)