



Public Schools of North Carolina

# **Publishers Meeting**

**NC Department of Public Instruction**

**March 15, 2019**

# Agenda

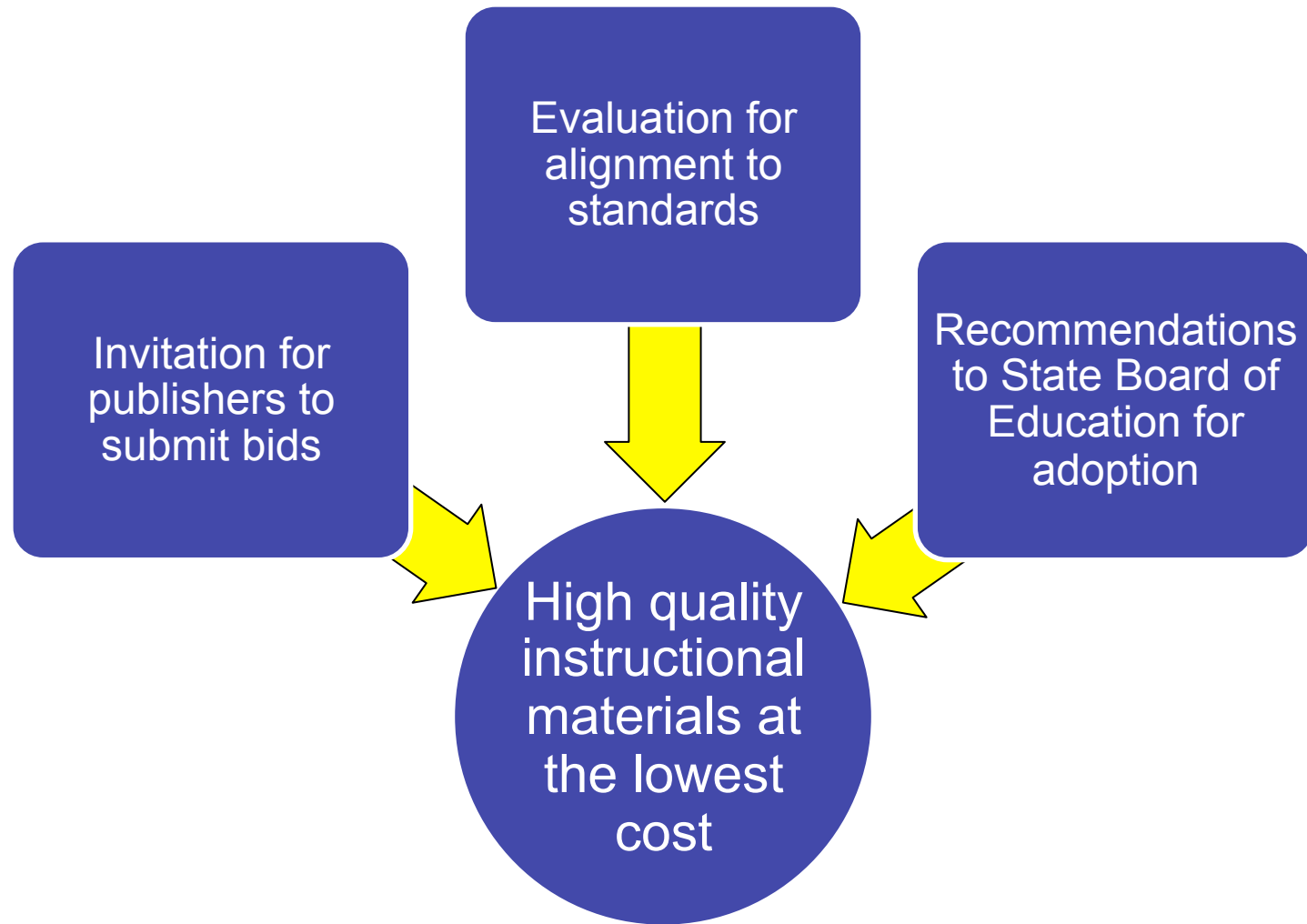
- Welcome
- Overview of Textbook Adoption Process
- Bid Submission Process
- Evaluation Setup and Logistics
- Next Steps
- Closing



# Overview



# Textbook Evaluation and Adoption Overview



## § 115C-85

### Defines textbooks

*... "textbook" means systematically organized material comprehensive enough to cover the primary objectives outlined in the standard course of study for a grade or course. Formats for textbooks may be print or **nonprint**, including hardbound books, softbound books, activity-oriented programs, classroom kits, and technology-based programs that require the use of electronic equipment in order to be used in the learning process.*



# Non-Print Materials

- Submissions may include web- and subscription based materials



# Why Textbook Evaluation and Adoption?



# Benefits to Districts/Schools

- Aligned with the Standard Course of Study
- Suitable for the grade/instructional level
- Appropriate for Exceptional Children and English Language Learners
- Offered at the lowest cost in the nation





# Benefits to Publishers

- High profile in the state
  - Titles placed on the approved list
  - Districts/schools encouraged to purchase textbooks on the approved list
- Cost savings
  - Centralized shipping to the NC Textbook Warehouse



# Who is involved?



# General Assembly

- Allocates textbook funding that is then allotted to districts based on their average daily membership
- Passes laws to govern the textbook adoption process including giving the authority to adopt textbooks to the State Board of Education



# Public School Law

## § 115C-85 through § 115C-102

### Examples:

- **§ 115C-85.** Defines textbooks
- **§ 115C-86.** Directs the State Board of Education to select and adopt textbooks aligned to the Standard Course of Study
- **§ 115C-89.** Requires the SBE to develop rules and procedures for publishers to submit bids and sign contracts



# Governor

- Appoints State Board of Education members
- Appoints Textbook Commission members upon recommendation by the State Superintendent



# State Superintendent

- Provides the Governor with recommendations for membership to the Textbook Commission
- Assigns staff from the North Carolina Department of Public Instruction to manage the textbook adoption process under his/her direction and to assist the Textbook Commission



# State Board of Education

- Selects and adopts textbooks as codified in the General Statutes of North Carolina **§ 115C-85 through § 115C-102**
- Adopts policies governing the textbook adoption process
  - **TEXT-000 through TEXT-008**



# Textbook Commission

- Primary responsibility is to evaluate textbooks and other duties as contained in **§ 115C-88 and § 115C-89**
- Consists of twenty-three members: teachers, principals, parents, and a local superintendent

Note: Commission members appoint advisors to assist with the evaluation





# Textbook Evaluation Advisors

- Assist the Commission in the evaluation of the textbooks
- Advisors vary for each adoption
- Work under the direction of the Textbook Commission members
- Comprised of teachers certified in the area under evaluation (e.g., Mathematics for the 2018 adoption)
- Preferred that evaluators are currently teaching in the area under evaluation



# Publishers

- Company or provider of textbooks/ instructional materials
- Publishers must be registered with the NC Publishers Registry to be invited to participate in the submission, evaluation, and adoption process



# NCDPI

## Digital Teaching and Learning Division - Textbook Adoption Staff

- Assist the State Superintendent in the implementation of the SBE textbook policies
- Support the Textbook Commission members and their advisors
- Communicate with the Publishers via the Publishers Registry
- Collaborate with Textbook Warehouse Staff



# What is the Process?



# Adoption Process

- DPI content consultants develop the criteria for evaluation and selection
- DPI drafts the *Invitation to Submit Textbooks for Evaluation and Adoption in NC*
  - criteria for selection
  - procedures publishers must follow
  - timeline for submission
- The SBE (including its legal counsel) approves the invitation and then it is sent to Publishers via the NC Publishers Registry



# Adoption Process (continued)

- The Textbook Commission selects the advisors who will apply the criteria to the submitted textbooks
- The Textbook Commissioners provide a recommended list of approved textbooks to the SBE
- The SBE makes the final decision regarding the list of approved textbooks
- Contracts are completed



# NC Publishers Registry

- Only companies on the registry maintained by the State Superintendent can participate
- Publisher removed if “undue pressure” is exercised toward:
  - State Board of Education
  - Textbook Commission
  - Textbook Evaluation Advisors
  - NCDPI Staff



# Undue Pressure

- “Undue pressure” defined as personal contact to advocate for the selection of a particular book or series of books
- Does not include social contact, presentations or written communication to the Commission for reconsideration or clarification





# SBE, Commission Members, Advisors, NCDPI Staff

## Standards of Conduct

- Demonstrate highest standards of personal conduct
- Avoid actual or perceived conflicts of interest
- Avoid solicitation or acceptance of any actual or promise of a favor or reward



# Review of the Bid Submission Process



# Requesting Bid Identification Numbers

- Each submission requires an identification number issued by NCDPI
- Email a request for the total number of identification numbers needed
- Email the request to [nctextbooks@dpi.nc.gov](mailto:nctextbooks@dpi.nc.gov)
- **Email subject line: Request for Identification Number(s)**



# Requesting Bid Identification Numbers

- Identification numbers are alpha-numeric
  - Ex. **RIC2000**
- The character will be three letters designated by DPI from the Publisher's/Company's name
- The **2000** series of numbers will be the base number for all bids for English language arts resources



# Examples of Bid Identification Numbers

- **Read It Company** requests 6 identification numbers

Bid ID #1	RIC2000
Bid ID #2	RIC2001
Bid ID #3	RIC2002
Bid ID #4	RIC2003
Bid ID #5	RIC2004
Bid ID #6	RIC2005

**DPI Assigned  
Identification Numbers  
for 6 bid submissions:**

**In this example RIC is created from the company's name Read It Company.**



# Examples of Bid Numbers

- Read It Company initially requests 6 identification numbers for bid submissions. The company decides to add four (4) more submissions.

Original Bid ID#'s requested
RIC2000
RIC2001
RIC2002
RIC2003
RIC2004
RIC2005

After requesting identification numbers, if Read It Company decides to add 4 more submissions, Read It Company may create the next four **consecutive** bid numbers continuing the pattern of assigned bid numbers and adding increments of 1:

$\text{RIC2005} + 1 = \text{RIC2006}$

<b>RIC2006</b>
<b>RIC2007</b>
<b>RIC2008</b>
<b>RIC2009</b>

# Examples of Bid Numbers

- Read It Company initially requests 6 identification numbers for bid submissions. The company decides to add four (4) more submissions.

Original Bid ID#'s requested
RIC2000
RIC2001
RIC2002
RIC2003
RIC2004
RIC2005

Additional ID#'s created after initial request
RIC2006
RIC2007
RIC2008
RIC2009



# Examples of Bid Numbers

Read It Company initially requests 6 identification numbers for bid submissions. The company decides to add four (4) more submissions.

Read It Company now has a total of 10 bid identification numbers.

Bid ID #1
Bid ID #2
Bid ID #3
Bid ID #4
Bid ID #5
Bid ID #6
Bid ID #7
Bid ID #8
Bid ID #9
Bid ID #10

RIC2000
RIC2001
RIC2002
RIC2003
RIC2004
<b>RIC2006</b>
<b>RIC2007</b>
<b>RIC2008</b>
<b>RIC2009</b>





# Cost Proposal Spreadsheet



# Purpose of the Spreadsheet

- The cost proposal spreadsheet will be used to enter bid information and prices for the textbook adoption process.
- Please save the spreadsheet with the following naming convention:
  - Company Name\_Cost Proposal\_2019
  - **(example)** ReadItCompany\_Cost Proposal\_2019



# Submission Parameters

- Textbook materials may be submitted for any grade level/course the Publisher deems appropriate. Cost Proposals must clearly state each grade level/course the Publisher deems appropriate.
  - Publishers must clearly specify, the grade levels/courses for any submitted materials prior to submission.
  - Textbook materials will only be evaluated for the grade levels/courses specified by the Publisher.
- \*Refer to pages 1 – 2 of the 2019 Invitation to see the full list of parameters.

# Submission Parameters

- **It is the responsibility of the Publisher to ensure that each submission is complete and correctly identified.**
- **Publishers shall ship sample textbook materials according to the schedule set by the North Carolina Department of Public Instruction. Sample textbook materials shall be shipped to sites designated by the North Carolina Department of Public Instruction.**
- **All shipped materials must contain the identification number that is supplied by the North Carolina Department of Public Instruction.**

**\*Refer to pages 1 – 2 of the 2019 Invitation to see the full list of parameters.**

# Submission Parameters

- Publishers shall send access information for technology-based programs or other non-print materials according to the schedule set by the North Carolina Department of Public Instruction.
- Access information for technology-based programs or other non-print materials shall be sent to sites designated by the North Carolina Department of Public Instruction.
- Access information for all materials must contain the identification number that is supplied by the North Carolina Department of Public Instruction.

\*Refer to pages 1 – 2 of the 2019 Invitation to see the full list of parameters.

## **Welcome to the North Carolina Cost Proposal Spreadsheet**

In accordance to the directions below, publishers are to fill out the cost proposal spreadsheet. When you have completed the form, please save it with the naming style of \*Company Name\_Cost Proposa\_2019I\* ex. ReadItCompany\_Cost Proposal\_2019.

### **Bid Submission**

Enter each submission to be presented for evaluation with a 13 digit ISBN. If the submission contains individual items, list the individual items on the spreadsheet. Each item within a submission should have a 13 digit ISBN. This is true even if the same submission is being offered over different periods of time (ex. a two year offer vs. a five year offer). Bold the line with the name of the submission and indent the name of any individual items. Do not use dashes when entering the ISBN information.

### **Enrichment Material Increments and Accompanying Student Material items**

Enter a list of all bid materials with prices such as Student Edition, Teacher Edition, Digital Edition, and other support materials that will be provided at no additional cost based on the number of core bid materials purchased, such as accompanying student materials and teacher enrichment materials. Publishers may submit up to seven (7) items considered as Teacher Enrichment Materials and up to four (4) items considered as Accompanying Student Materials. Do not use dashes when entering the ISBN information. Example items are provided.

# Example

Bid Number	Title	Grade Level or Course Title	ISBN	Publisher	Copyright	Edition	NIMAS Compliant Files?	Net Wholesale	NC Warehouse Allowance	Bid Price
<b>RIC2000</b>	<b>English Language Arts (5 year digital subscription)</b>	<b>6</b>	<b>9785678912345</b>	<b>Anybook Publisher</b>	<b>2016</b>			<b>\$760.00</b>	<b>\$60.80</b>	<b>\$699.20</b>
	English Language Arts Course Digital Student Edition	6	9785678954321	Anybook Publisher	2016	1	Yes	\$55.00	\$4.40	\$50.60
	English Language Arts Course Digital Teacher Edition	6	9787891234567	Anybook Publisher	2016	1		\$47.00	\$3.76	\$43.24
	English Language Arts Course Digital Resources	6	9781234956789	Anybook Publisher	2016	1		\$35.00	\$2.80	\$32.20
	English Language Arts Course Digital Assessment Resource	6	9781234987654	Anybook Publisher	2016	1		\$25.00	\$2.00	\$23.00
<b>RIC2001</b>	<b>English Language Arts</b>	<b>7</b>	<b>9781234545678</b>	<b>Anybook Publisher</b>	<b>2016</b>			<b>\$152.00</b>	<b>\$12.16</b>	<b>\$139.84</b>
	English Language Arts Course Student Edition	7	9785678954321	Anybook Publisher	2016	1	Yes	\$55.00	\$4.40	\$50.60
	English Language Arts Course Teacher Edition	7	9787891234567	Anybook Publisher	2016	1		\$47.00	\$3.76	\$43.24
	English Language Arts Course Resources	7	9781234956789	Anybook Publisher	2016	1		\$35.00	\$2.80	\$32.20
	English Language Arts Course Assessments	7	9781234987654	Anybook Publisher	2016	1		\$25.00	\$2.00	\$23.00



# Example - ASM

<b>Accompanying Student Materials (ASM) Maximum 4 Items</b> <b>(See the 2019 Invitation for more specific details about ASM and EM.)</b>				
<b>Title</b>	<b>Grade Level or Course</b>	<b>ISBN</b>	<b>Ratio Number per classroom; collection purchased; per teacher, per school, per district (specify), also frequency of offer such as annually, quarterly, monthly</b>	<b>Price for Additional Copies</b>
English Language Arts ASM 1	6	9781122334455	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	35.00
English Language Arts ASM 2	6	9782233445566	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	6.25
English Language Arts ASM 3	6	9783344556677	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	7.15
English Language Arts ASM 4	6	9784455667788	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	6.25



# Example - EM

<b>Enrichment Materials (EM) Maximum 7 items</b> <b>(See the 2016 Invitation for more specific details about ASM and EM.)</b>				
<b>Title</b>	<b>Grade Level or Course</b>	<b>ISBN</b>	<b>Ratio</b> <b>Number per classroom; collection purchased;</b> <b>per teacher, per school, per district (specify),</b> <b>also frequency of offer such as annually,</b> <b>quarterly, monthly</b>	<b>Price for Additional Copies</b>
English Language Arts EM 1 Chapter Resources	6	9781912345678	Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions) upon request, initial year of purchase.	250.00
English Language Arts EM 2	6	9781923456789	Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions) upon request, initial year of purchase.	185.00
English Language Arts EM 3	6	9781934567891	Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions) upon request, initial year of purchase.	40.00
English Language Arts EM 4	6	9781956789123	Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions) upon request, initial year of purchase.	40.00

# Sample Sites



# Selected Sample Sites

- Publishers requesting identification numbers will also receive a list of selected sample sites.
- Bid submission samples are required for the Textbook Warehouse and Textbook Commissioners selected sites
- Samples must not be delivered before June 3<sup>rd</sup> and no later than June 7<sup>th</sup>



## **Selected site locations**

- There will be 23 sites selected by the Textbook Commissioners as well as the Textbook Warehouse
- Samples will arrive no earlier than **June 3<sup>rd</sup>** and no later than **June 7<sup>th</sup>**

# Evaluation Setup and Logistics



# Evaluation Setup and Logistics

## Important Dates:

**July 8<sup>th</sup>** (set up) from 9 am – 12 pm and presentations (optional – time: TBA)

**July 13<sup>th</sup>** (removal of materials/equipment) from 2 pm – 4 pm

## Evaluation site:

Embassy Suites Greensboro Airport,  
204 Centreport Drive,  
Greensboro, NC 27409.

# Submitting Questions

- Deadline for submitting written questions regarding the 2019 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina is March 25, 2019 by 2:00 pm (EST).
- All questions must be written and submitted to [barbara.littauer@dpi.nc.gov](mailto:barbara.littauer@dpi.nc.gov) by 2:00 pm (EST) March 25, 2019
- All questions will be answered and distributed to publishers

# Textbook Adoption Web Page

Information about the 2018 Textbook Adoption Process can be found at:

<http://www.ncpublicschools.org/textbook/>

*Invitation to Submit Textbooks for  
Evaluation and Adoption in North  
Carolina*

...and more...





# Next Steps



# Guidelines and Parameters

- Read the entire 2019 Invitation

**2019 Invitation to Submit Textbooks  
for Evaluation and Adoption  
in North Carolina**



North Carolina Department of Public Instruction  
301 North Wilmington Street  
Raleigh, NC 27601

# Blackout Period

## *SBE, DPI, Textbook Commission*

*At no time during the adoption process*

- from the time the State Board approves the call Invitation*
- until the State Board adopts the list of textbooks*

*may the Commission or any of its members meet privately with any publishers' representatives.*

*(March 7, 2019 –September 5, 2019[tentative])*

# **Blackout Period**

## **Sampling promotion**

- No sampling or promotion of textbooks/programs under consideration for adoption by the Textbook Commission and State Board of Education shall be made
  - **from the date the State Board approves and issues the 2019 Invitation**
  - **until the day after the Textbook Commission's evaluation sessions with the Textbook Advisors.**

**(March 7, 2019 – July 14, 2019)**

# Blackout Period

## Sampling promotion

- Promotion shall include displays at conferences, sponsored workshops/seminars, or other similar activities in North Carolina at which materials under consideration are discussed.



# Submissions Due

April 9, 2019 by 2 pm



# Closing



# **Contact Information**

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