

## **Meeting with Publishers**

### Meeting Notes

March 13, 2020

Note: There is a PowerPoint slide presentation available that provided the talking points for this presentation.

The meeting began with a welcome and introduction by Dr. Carmella Fair, Instructional Resource Consultant at the North Carolina Department of Public Instruction who coordinates and facilitates the state textbook adoption process. Dr. Fair highlighted the point of the meeting is to provide information and details as outlined in the 2020 Invitation. She stated the webinar would be recorded and the recording and presentation would be made available on the website. Dr. Fair mentioned the Invitation and agenda for the meeting are already available and accessible on the website.

Dr. Fair explained the opportunity for publishers to submit written questions, but she will stop during the presentation for questions. She asked listeners to note the responses given would not be the official DPI responses and that publishers should submit their questions in written form during the official question period for an official response.

Dr. Fair did an overview of the agenda: welcome, overview of the NC textbook adoption process, bid submission process, evaluation setup, logistics, removal of materials, next steps and closing.

### **Overview of the NC Textbook Adoption Process**

Dr. Fair mentioned, the process begins after the State Board of Education (SBE) approves the Invitation. The SBE approved the 2020 Invitation during the March 4-5 meeting. The information was sent out through the North Carolina Publisher's Registry. Publishers on the registry should have received that information. Dr. Fair emphasized that publishers must be listed on the registry for her to send out the Invitation and other communications including updates and revisions. This information is posted on the webpage but only publishers on the registry get the information in an email. Publishers must be on the registry to submit for adoption. Dr. Fair explained how interested publishers could sign up for the registry using a form on the web page "Information for publishers".

After the Invitation goes out, there is an evaluation. There is a review for alignment to standards and instructional material criteria included in the Invitation. After these reviews, Textbook Commissioners conduct their reviews and make recommendations to the SBE. Dr. Fair highlighted the benefit of the process as a list of high quality materials at the lowest cost for districts/schools who order from the adopted list.

Sometimes the word textbook is misunderstood as only print materials. It means print as well as digital. There is a definition of textbook in NC General Statutes (115C-85). Dr. Fair highlighted: materials comprehensive enough to cover objectives outlined in the North Carolina Standard Course of Study, formats may be print or non-print which includes technology-based programs that students may have to use electronic equipment to access. Digital and electronic submissions are welcome in bids as publishers choose to bid. Submissions may include web- and subscription-based materials as there are a number of schools trying to use more digital materials.

Why the textbook adoption process?

There are many benefits for a state-level adoption. The first concerns the benefits to districts and schools: considered aligned the Standard Course of Study based on reviews; guarantee the materials are suitable for the grade/instructional level because NC teachers are a part of the review process and look for this; appropriate for exceptional children (EC) and English language learners (EL) - there are criteria sheets in the Invitation for EC and EL educators to review because the expectation is that materials are appropriate for all students - general, EC and EL. The greatest benefit is the materials on the adopted list are offered for the lowest cost in the nation - whatever is submitted for adoption is provided for the lowest price and during the contract if prices are lowered, they are also lowered on the list.

There are also benefits for publishers. A high profile in the state on the SBE approved and adopted list so districts and schools can purchase from the list as they deem appropriate. NC is a local control state, so districts and schools have their own adoption process at the local level and make decisions based on what is appropriate for students, classrooms and districts. They are encouraged to purchase from the list, the information is made available publicly as well as the information about a review for alignment to standards and quality criteria. There is a cost savings for publishers due to a centralized shipping process to the state textbook warehouse.

Who is involved?

The General Assembly allocates funding to districts who can use the funding to purchase instructional materials; pass laws that govern the process and give the SBE the authority to carry out the process with Textbook Commissioners and teachers to produce an adopted list to post on the webpage. Public school laws include G.S. 115C-85 through G.S. 115C-102. Dr. Fair highlighted G.S. 115C-85. Defines textbooks, G.S. 115C-86. Directs the State Board of Education to select and adopt textbooks aligned to the Standard Course of Study - which is emphasized - on the criteria sheets there are certain percentages (to meet standards alignment) and the advisors will check to see that materials are aligned to the standards based on those percentages or higher, G.S. 115C-89. Requires the SBE to develop rules and procedures for publishers to submit bids and sign contracts - what are the procedures and guidelines you must follow to submit a bid and then follow through, if adopted, to complete contracts?

The Governor appoints SBE members and appoints the Textbook Commission members based on the recommendation of the State Superintendent. The make-up of the commission will be discussed.

The State Superintendent makes recommendation of members to the Governor's Office, which goes through the approval process at the Governor's Office before people become Textbook Commissioners. The State Superintendent also assigns DPI staff to work with the process and the Textbook Commission. Dr. Fair explained that her role is working with the adoption process, publishers, the Textbook Commissioners, and coordinating evaluation week.

The SBE selects and adopts textbooks as codified in NC General Statutes. The commissioners work with teachers who do evaluations and reviews and the commissioners file reports made on their recommendations to the SBE and the SBE makes the decision to adopt. The SBE adopts policies that govern the textbook adoption process. There are General Statutes (115C-85 through 115C-102) and SBE Policies (TEXT-000 through TEXT-008) that govern the process. This information is available on the textbook adoption webpage for more thorough review. Information about the process, the Textbook Commission, local adoption processes, etc. There are a few statutes and policies specific to publishers that would be good for you to understand.

The Textbook Commission is primarily responsible for evaluating textbooks based on General Statutes and State Board Policies. The commission consists of 23 members and they have various roles at various grade levels, K-5, 6-8 and 9-12 represented by principals, teachers, parents and one local superintendent. Commission members select advisors to assist with the evaluation. The advisors evaluate and provide information for commissioners who then use the information in their decisions.

Textbook Evaluation Advisors work with commissioners during evaluation week. The advisors vary by adoption depending on the content area such as English Language Arts, last year, and Mathematics and CTE, this year. Some elementary teachers may participate in multiple years but this year with high school mathematics and CTE, they are looking for upper and secondary grades (teachers). The advisors work under the direction of the Textbook Commission members who work with them to be sure they can access materials and understand what alignments are needed in the review. The teachers are usually certified in the areas they are evaluating. There is a process for recruitment and selection to be sure they can review based on standards and criteria. It is preferred that evaluators are currently teaching in the area they will review. The Textbook Commission retains the right that if there are teachers who can teach multiple courses or grades, they may reassign them depending on the amount of materials and the number of teachers.

Publishers provide the bids with instructional materials. Dr. Fair emphasized again that It is important to sign up on the Publisher's Registry if you are not already on it, so you can participate, submit and have materials evaluated for possible adoption. There is a web page called "Information for Publishers" and there is a button on that page you can use to access a form to enter that information.

The Digital Teaching and Learning Division work as support staff for textbook adoption specifically, Dr. Fair works with the State Superintendent's Office to implement the Board

policies that guide textbook adoption and assists in the process of sending recommendations to the Governor's Office for the Textbook Commission. She supports Textbook Commissioners when they select advisors and prepare for evaluation week. She also communicates with publishers through the Publisher's Registry and during the bid process along with someone in the purchasing office (DPI). She collaborates with the textbook warehouse staff. Someone from that staff attends this meeting and participates throughout the process.

What is the Process?

DPI content consultants create the criteria for evaluation and selection which depends on the content area considered for adoption. This year, math consultants and CTE consultants created the instructional materials criteria review sheets. These consultants will train the teachers and commissioners on the criteria sheets. DPI drafts the Invitation to include procedures for publishers, the timeline for submission and the criteria for selection. The SBE and legal counsel for the SBE approve the Invitation and only after approval the Invitation is distributed to publishers.

Commissioners select advisors through a process of recruitment and selection based on criteria such as teachers are certified in the content area and teaching in the content area to ensure they select teachers who will provide good assistance in selection and review. Textbook Commissioners are responsible for providing a list of recommended materials to the SBE. The commissioners are responsible for providing a list of recommended materials to the SBE so they have a deliberations meeting during which they determine which materials to recommend and if there are materials they would not recommend. These go on a list that is a public document. The list is emailed to publishers who have participated in the process as outlined in the schedule and the list becomes a part of Board materials for the SBE to make the final decision for adoption. After this, the procurement office works with publishers to get contracts and other documents.

NC Publisher's Registry

Only publishers on the NC Publisher's Registry may participate in the textbook adoption process. Publishers should not make any undue pressure, personal contact to advocate for the selection of materials, toward SBE member, Textbook Commissioner, Textbook Evaluation Advisors or any DPI staff. Undue pressure does not include social contact, presentations or written communication, just personal contact for the purpose of influencing selection of your materials. Avoid undue pressure.

SBE, Commission Members, Advisors, NCDPI Staff

These groups are held to the SBE's Standards of Conduct: have a high standard of conduct, avoid anything that can be perceived as a conflict of interest and avoid solicitation or accepting anything that may be considered a promise, favor or reward. This is important for these four groups.

**Bid Submission Process**

This will cover things publishers need to do to put a bid together to submit for consideration through the evaluation process.

### Requesting Bid Identification Numbers

For a few years, there has been a system where publishers have to request bid identification numbers for the bid document. Anything submitted requires an identification number. DPI does not tell publishers what to submit or how to write the submission. All the details of the bid submission are up to the publisher. DPI provides bid numbers required to go on any component of a submission including samples and displays. Publishers must send an email to request bid identification numbers. A request should be sent for the total numbers needed to the email address: [nctextbooks@dpi.nc.gov](mailto:nctextbooks@dpi.nc.gov) with the subject line: Request for Identification Numbers.

Identification numbers will be alphanumeric with three letters representing the company name and a series of numbers based on a series provided by DPI for the specific content area. For high school math, the 1100 series of numbers will be used, and the 3000 series will be used for CTE.

#### An example (mathematics):

If Any Book Publisher decides to participate in the textbook adoption process. They want to submit six submissions, so they send an email to request six bid numbers for mathematics materials. DPI assigns consecutive bid numbers, ABP1100, ABP1101, ABP1102, ABP1103, ABP1104 and ABP1105. The company name Any Book Publisher was shortened to ABP and put with the series number for the mathematics materials. These are the assigned identification numbers that would be provided for the request for six identification numbers. If Any Book Publisher gets the numbers and decides to add four more submissions. Once bid numbers are received and you want to add more, just add increments of 1 to the assigned bid number. From the example of numbers ABP1100, ABP1101, ABP1102, ABP1103, ABP1104 and ABP1105, all you would need to do is add one to ABP1105 for ABP1106 and adding more after that, ABP1107, ABP1108 and ABP1109. If Any Book Publisher wants to add more, they would continue adding on this sequence to get more bid numbers. Once ABP adds four additional numbers they have a total of 10 bid numbers, ABP1100, ABP1101, ABP1102, ABP1103, ABP1104, ABP1105, ABP1106, ABP1107, ABP1108 and ABP1109. Your initial request for bid numbers must be made to DPI but if you decide to add more submissions, you may by adding increments of one to get additional numbers. Sometimes people ask, "What happens if you request 10 numbers and you really only want to use two. That is fine. You do not have to use all the numbers you request because it is your submission. If you request 10 numbers and you only need two, then you will only use two of the numbers that you received.

#### An example (CTE):

Career First Company requests 4 identification numbers for CTE materials. Earlier it was mentioned the 3000 series of numbers would be used for CTE. In this example, Career First Company is abbreviated CFC. Their DPI assigned bid numbers would be CFC3000, CFC3001, CFC3002, CFC3003. Career First Company can add more numbers or only use one or three

numbers. Make the initial request to get the official numbers from DPI and then you have the flexibility to add more numbers.

Pause for questions. Kathleen Linker is on the webinar and will check for questions. Participants can raise their hands (in the webinar platform). Checking for questions about requesting bid numbers.

No hands or questions, moving forward in presentation.

### Cost Proposal Spreadsheet

The cost proposal spreadsheet is an Excel document publishers will receive. The document contains information and a template for the spreadsheet to submit bids. There are also sheets for accompanying student materials and enrichment materials. Publishers are asked to use the template provided and not to save or send (submit) the sheet as a pdf. DPI wants the sheet in Excel.

The sheet will be used for bid information and pricing. The bid proposal submission page will have information about submitting with prices/without prices. Publishers are asked to save the spreadsheet with a specific name; the company name, the words “cost proposal” and “2020”. In the example, Any Book Publisher would name the file, AnyBookPublisher\_Cost Proposal\_2020.

Submission parameters are outlined in the 2020 Invitation beginning on page 1. Pages 1 and 2 contain a lot of details for the submission parameters. DPI encourages that anyone at the company who will be involved (bid submission, samples, evaluation, etc.) knows and understands the (submission) parameters and guidelines in the Invitation. DPI does not tell publishers how to submit bids, the examples provided are examples only. Publishers determine the grade level/course to submit and must show this clearly on the cost proposal form. The designation of grade level and course (9th grade, 10th grade, NC Math 1, etc.) is determined by the publisher and must be included in the spreadsheet. Publishers should also be sure all the correct information is included in labeling, which will be discussed later.

Bid submission sheets will be used for evaluations. Commissioners and teachers will review whatever comes under a bid number for alignment to standards and to meet the criteria. If one thing (the bid) does not meet the standards, then it will not be evaluated for the criteria because that is the first measure, (alignment to) a certain percentage of standards. Materials will only be evaluated by the grade level/course specified by the publisher and will be evaluated for standards alignment and criteria. Pages 1 and 2 have the specific submission parameters but publishers need to read the entire Invitation for all the guidelines.

### Example - Cost Proposal Directions

An example of directions shows how to name the form - publisher name and cost proposal for 2020. It indicates information like having the 13-digit ISBN. For bids with components under the bid, every item or component in the submission must have a 13-digit ISBN. The NC textbook warehouse indicates this is needed/required. The appropriate 13-digit ISBN is even required

over different time periods, 2-year or 5-year, etc. Publishers are asked to bold the line with the name of the submission and bid number and anything else that comes within that bid should be listed underneath. Be reminded not to use dashes in the ISBN.

There are separate sheets for enrichment materials and accompanying student materials that publishers may be providing. The specific guidelines for these types of materials are in the Invitation for any publisher who may be submitting them. The numbers of these types of materials that may be submitted are provided - up to 7 for enrichment materials and up to 4 for accompanying student materials. Publishers are able to determine the ratios. Remember, do not use dashes in the ISBN. There will be examples on the cost proposal spreadsheet, these are examples only, nothing in stone. These are intended to only be examples of how to use the sheet, not that these are actual materials or how it should look. It looks different for different publishers, so it depends on your submissions and how you choose to submit. The main point of the example is to show the columns publishers will fill-in.

Required information in the columns: the requested bid number from DPI, the title of the materials, the grade level or course title, the ISBN, publisher name, copyright, if there is an edition, whether there are NIMAS compliant files, the net wholesale, warehouse allowance and bid price. The details about the calculations are part of the materials publishers receive. The examples are just samples to show how to fill in the sheet, nothing else. The way the sheet looks here, ABP110, has about 4 components underneath it. Those components, together, would have to align with the established percentage for standards alignment and meet the criteria as outlined for that grade or course. The spreadsheet does not have formulas and it will not calculate so publishers are responsible for keying in this information and calculations. Double check to be sure it is error free when you submit the bid submission.

A sample for accompanying student materials (ASM) which have a maximum of 4 items is included. There is also an example in the Invitation for the cost proposal sheet and the ASM sheet. These are examples to show information that should be provided: title, grade level or course, ISBN, ratio, and price for additional copies.

A sample for enrichment materials (EM) which have a maximum of 7 items. This is just an example to show what is required for information: title, grade level or course, ISBN, ratio, and price for additional copies.

Those are basic slides and basic examples. There will be a sample in the cost proposal materials publishers will receive. There will probably be an example of math and an example of CTE. These are just examples. Publishers have to decide how to establish the bid. The way the bid information is indicated on the spreadsheet is the way the materials will be evaluated. In the example provided, ABP1100, the commissioners and teachers will evaluate all of the components checking for standards alignment for the percentage and for alignment to the criteria. It is the same with example ABP1101, everything that is listed would be evaluated against alignment of the standards to the percentage and the evaluation criteria. Publishers need to be sure whatever is listed will be able to make the minimum standard percentage if not

higher. It needs to be emphasized, the bid needs to pass the alignment review and criteria review. There was a pause in the presentation for questions at this point.

#### Questions

Q: In the grade level or course column, is it acceptable to list a series like grades 6 through 8? What standards would be used to gauge that material?

R: Just a reminder, questions must be submitted through the written process as outlined in the Invitation. The answer given today is not an official answer, but it will be a response to this question. It is up to the publisher, if desired, to enter a range of grades. Do note if a range is entered, it will have to meet the requirements for all the grades in that range. If a bid is entered for a range of 6-8, the standards for 6th grade, 7th grade and 8th grade would be used to gauge that material. It would be all of those grade levels, 6, 7 and 8. That means, the materials would have to meet the percentage for each of those grade levels. They would have to meet percentage of standards alignment for 6th, percentage of standards alignment for 7th and percentage of standards alignment for 8th.

Keep in mind, there will be a period of time to submit written questions. During that time, the written questions will be sent to the procurement specialist. The questions will be compiled, and responses will be obtained from the appropriate people at DPI. All the questions will be answered and there will be a deadline for posting them. Publishers are encouraged if asking a question (today) to submit it during the written question period.

Q: Is there warehousing for digital materials?

R: That one will need to be submitted as a written question. Would like to be sure there is a total understanding of what is asked. The warehouse does not maintain any materials on site. They act as purchasing agents and order materials based on what the LEAs require/ask for in their purchasing and they make sure the materials get to those schools. As far as the warehouse maintaining any type of materials on site, they do not if that is the question. The person who asked the question is encouraged to submit the question in written form being sure to be clear about what they want to know especially if this does not answer the question.

#### **Sample Sites**

There are sample sites where publishers have to send materials for review by textbook commissioners. There is also an official DPI sample site which is the textbook warehouse. All that information is in the 2020 Invitation. The submission parameters on pages 1 and 2 detail it is the responsibility of the publisher to be sure the submissions sent to sample sites, that will be brought to display for evaluation week, that they are completely and correctly identified. Meaning they are labeled. Everything that is part of a bid should be labeled. There are specific instructions for labeling. Materials that can be picked up with the hands, will be used by different teachers for the review so it is important that the materials are easily identifiable so they can stay and remain in the table when not in use with the appropriate bid submission. Publishers are

asked to completely and correctly identify everything that is a part of a submission. There is a schedule for sending sample materials to the sample sites. There is a range of dates designated in the tentative schedule, in June. Samples are not supposed to be delivered before June 1st but no later than June 5th. It is the publisher's responsibility to make sure the materials are getting to the commissioners. Publishers must send them in a way to guarantee that they are going to get there by June 5th. It is emphasized that they (the samples) must have the identification number that is provided by DPI or if publishers have added increments (to the original identification number from DPI) to add more submissions, those (numbers) as well. Submissions have to have the bid numbers, the identification numbers. Also, in the Invitation, the window opens up for publishers to request bid numbers so be sure to have the emails in by the deadline to request bid numbers. The deadline for questions is March 23rd so adhere to that and the deadline to request bid identification numbers is March 27th. Anytime beginning today (March 13) through (March) 27th, send an email as designated in the Invitation to receive bid identification numbers.

Publishers submitting technology based programs or digital programs or materials or anything that is non-print, are asked to send access information by mailing it to the sample sites and the official DPI sample site. There are guidelines on what that entails which is the same information, but it also includes how someone would actually access your materials, login, username, etc. That information is in the Invitation and publishers should be sure to provide that information. In the past, some publishers have sent an envelope with a document that has all the information to make it available to commissioners. That information should be sent just like any other sample, but it would just be a list of those materials that would be digital or electronic. That will go to all of the sites as well as the textbook warehouse. The identification number must also be included with the access information for all the digital or electronic materials. Publishers will also need to include the bid ID. This information is on pages 1 and 2 and there are also pages that spell out what publishers need to do when preparing to send things to the sample sites.

The next slide has information that is new this year. During previous adoptions, it was recognized that sometimes it is not easy for teachers or commissioners to navigate technology-based or non-print materials provided by publishers. In the past, the Invitation has asked that publishers provide information about navigation, sometimes that information has not been received. It has not been easy for those reviewing to navigate. For this year, the request is for specific instructions on how to navigate the materials with a request for publishers to provide by video or screencast, that is no longer than 10 minutes, or an electronic document that provides the navigation instructions. A video or screen cast is preferred but publishers are also able to submit through an electronic document to provide the navigation instructions. Publishers can do a video, a screencast and/or an electronic document. This is an emphasis because evaluators including teachers/advisors and commissioners, need to be able to navigate to see the resources, to see everything that is there so they evaluate and review the resources properly. How do you get the information to DPI? Provide a link for access to any video or screencast instructions as well as an electronic document. Any of the instructions must be submitted to this email address ([nctextbooks@dpi.nc.gov](mailto:nctextbooks@dpi.nc.gov)) based on the schedule. There are details in the tentative schedule about when this information is due so be sure to look through the schedule

and submit this information along with the information for the bid. Publishers will actually mail the bid information but will email the navigation instructions whether it is a link for a video or a screencast or you send an electronic document. Access for these instructions must work through October 30, 2020 because there needs to be enough time for everybody to get to do their reviews and have access. This deadline is in place now but sometimes circumstances beyond control occur, and sometimes the dates on the tentative schedule may have to change. If the dates change, there may be a change in this date as well for maintaining the access information. That would be communicated if necessary. Access is needed throughout the whole process through taking it to the Board. Make sure information for tech support is provided in the bid submission as well as during check-in with DPI on site for evaluation. DPI is asking for contact information for technical support. The navigation information should be sent through email ([nctextbooks@dpi.nc.gov](mailto:nctextbooks@dpi.nc.gov)) and contact information for technical support will be provided with submissions and at check-in at the evaluation site.

Publishers who request bid numbers will receive a list of the selected sample sites. Publishers who are not participating or who do not request bid ID numbers will not receive this information because they will not be sending samples to the sites. Publishers who request identification numbers will also receive a list of selected sample sites at a later date. The commissioners are currently working on securing those sites. It may take time depending on the location. As soon as this information is received from the commissioners, the information will go out to publishers who have requested identification numbers through an email so you will be able to send samples to the sites. It is a requirement for publishers to submit the samples to the sites and to the textbook warehouse. The submission of the samples to the selected sample sites allows the commissioners to have access to do their reviews. It is important for commissioners to have this access because they review everything. Each commissioner reviews everything that comes in from every publisher while the teachers or advisors review based on their grade level and assignment. Since they (the commissioners) review everything, they will need the time and access to do a great job. The samples should not be delivered before June 1st and no later than June 5th.

#### Selected sample site locations

There will be at most 23 sites selected by Commissioners as well as the official DPI site which is the textbook warehouse. The most would be 24 in terms of sample sites. The number of sample sites is determined by fact that the Textbook Commission is comprised of 23 members.

Currently in the process of filling vacancies on the commission, working with the State Superintendent's Office and the Governor's Office to fill them. Hoping those positions will be filled soon so that when the sample site list goes to publishers, all the information will be there, the most current and updated information. That is why there are 23 sites and when the textbook warehouse (official DPI site) is added, that makes 24 sites. A reminder, samples should not arrive before June 1st or after June 5th. Be sure you can adhere to this because some of the commissioners will use schools, universities or home locations. The commissioners will provide specific directions, for example, if the school closes at a certain time they may say please only

send deliveries at this time frame or they may say please send deliveries only on this day or have deliveries sent to this building. The document sent will have selected sites and any specific or particular directions included.

#### Questions

There were none. Dr. Fair moved on to the next topic.

### **Evaluation Set-up, Logistics and Removal of Materials**

#### Evaluation Setup

The important tentative dates for evaluation are July 6th and July 11th. July 6th is the day publishers are asked to set up displays. This year, the time has changed slightly. Typically, in the past, the time has been from 9 a.m. to 12 p.m. but the commissioners feel more time is needed to make sure set-up is complete by 12:00 because there are other activities that start in the afternoon. This year commissioners are asking for the hours of 8 a.m. to 12 p.m. That would be the time that publishers will set up and make sure a member of the committee checks off the displays are set-up appropriately and that there is nothing inappropriate on displays. Also during that time on July 6th after set-up, there will be optional scheduled presentations. During the presentations, the commissioners prefer highlighting the materials and the navigation of the materials. They do not want a sales pitch; they want to know about the materials and how to navigate and find things in the materials. Keep that in consideration if planning to present. An email will go out closer to this time asking if you would like to present. If yes, presentation times will be (distributed) received.

When setting up for evaluation displays, publishers will be assigned a number of tables, based on the number of submissions. The email about presentations will include information about the assigned room for the publisher as well as how many tables are assigned (to the publisher) in that room. Table tents will be used so publishers will know which specific tables are assigned.

#### **Logistics/Removal of materials**

July 11 is proposed as the last day for evaluation. Removal of materials and equipment is from 2 p.m. to 4 p.m. Sometimes evaluation finishes early and contact information will be used to reach out to (publishers) to indicate evaluation finished early and if you like you can come back early but someone remains onsite until 4 p.m. because that is the time advertised. The evaluation site has not been determined. The evaluation is in July, but a determination of the evaluation site has not been made based on the State of Emergency in North Carolina. Publishers will be kept abreast if there is an impact on evaluation week. Publishers will receive information about that if there are any changes about that but now the evaluation site has not been selected and that information will be shared and updated in the documents that are currently available once that has taken place.

#### Submitting Questions

The deadline for submitting questions is by 2 p.m. on March 23rd. Questions need to go to the Purchasing Office to Mashonda Southerland. Her email address is here (on the slide - [mashonda.southerland@dpi.nc.gov](mailto:mashonda.southerland@dpi.nc.gov)) as well as in the Invitation. Those questions will be

answered and distributed through the Publisher's Registry and they will be posted on the public website. There will be questions and answers. Please be as clear as possible in asking questions.

#### Textbook Adoption Web Page

There is a new website, the agency moved to a new website not too long ago. This is the URL for the textbook adoption main page, <https://www.dpi.nc.gov/districts-schools/district-operations/textbook-adoption>

On the page [www.dpi.nc.gov](http://www.dpi.nc.gov), select "districts and schools" and "district operations" and "textbook adoption. There are various topics on the navigation bar, information for publishers, textbook commission meetings, public school laws and policies or General Statutes and policies. Everything dealing with textbooks would be found among those pages.

#### **Next steps**

Read the entire 2020 Invitation which includes requirements, bid proposal information and a whole lot more is included in the Invitation. Read the guidelines to be in compliance with the samples, displays on site and submissions. It is important that anyone participating in bid submissions, samples, displays, anything dealing with the process, share the Invitation with them and have them read the parameters and guidelines. Encouraging everyone to be informed on the expectations so that once on site, it is easy to do the things outlined and be in compliance with the rules, regulations and guidelines.

#### Blackout Period, SBE, DPI, Textbook Commission

There are two distinct periods that are often referred to as the blackout. At no time during the adoption process should publishers meet privately with commission members and others as outlined in the Invitation, from the time the Invitation is approved, which was last week, March 5, until the time the SBE adopts the list of textbooks. That date is listed in the tentative schedule, the date the list will go to the State Board in October. So it is from now through October that publishers should not meet privately with Textbook Commissioners, DPI staff, State Board of Education staff. Also, publishers are asked not to sample or promote any materials that will be submitted for consideration for adoption by the Textbook Commission or State Board. That period is from when the State Board approves, March 5, until the day after the evaluation sessions with the teachers. The teachers are meeting through July 11th, so the day after will be July 12th. This means no sampling or promoting of anything that will be under consideration for adoption. Publishers are also asked that if there are specific questions about that, to work with your legal counsel to determine what would be appropriate for this guideline.

Promotion includes displays at conferences, workshops, seminars or anything similar to that in North Carolina while the materials are being discussed. The one blackout period for the sampling and promotion is because there will be teachers who will join the commissioners in the review of the materials. Don't want the teachers influenced in any way, shape or form by presentations or displays at conferences or anything similar on materials that are under

consideration for adoption. Those materials that publishers are including in a bid submission are the ones in reference.

### **Submissions Due**

Submissions are due on April 13 by 2 pm. All the details are in the Invitation, so review that document. Read the entire 2020 Invitation and be sure others involved with bid submissions, samples, displays - any parts of this process - should also be familiar with the parameters and guidelines in the Invitation. This is just a snippet of what's in there: introduction and requirements, tentative schedule and bid proposal information. These are key pieces but not the only pieces. They are other pages that are just as important in the document so take the time to go through the document thoroughly.

There is a list of the content area, grade level courses that are under adoption this year. This includes NC Math 1, 2, 3, all of that is a listing of the courses. Math courses hyperlink to the standards so click on this page or on one of the other pages prior to this one where you see the courses are hyperlinked which will take you directly to the state standards for those courses. There is also the Instructional Materials Review Criteria Sheets for grades 9-12. This is what the teachers and the commissioners will use to determine what they will or possibly not recommend to the State Board. This is where you will find the information about standards alignment, the percentage that is expected and if it doesn't meet the criteria in part I, then it will not be reviewed for any more criteria. Part I includes the alignment to content area standards at a certain percentage but also has other requirements there as well. Encourage publishers to take a look at that and make sure anyone involved in submissions and displays understand everything in the Invitation. Publishers are not asked to complete the review criteria sheet to submit with the submission. It is required for publishers to submit a correlation to the standards. That is required and publishers can find out more about that in the Invitation. There is not a template for the correlation, but it is expected for the correlation to be an honest and complete and thorough correlation. Similar documents are included for Career and Technical Education: a listing of the current content areas, there are quite a few, because it has been a while since there has been an adoption for CTE. All of the program areas and specific courses under the program areas up for adoption on this cycle are listed. There are various criteria sheets for those courses and publishers will be able to see which criteria sheets are designated for which courses. The percentage of the alignment to the standards will be in part I as well as other criteria and it has to meet part I to go through a complete review which is because of the critical alignment to state standards.

### **Closing**

Be sure to go through the Invitation. Look at all the parameters and guidelines for navigation instructions, labeling materials, sample site information, textbook warehouse sample information, information about the NIMAS files and evaluation and deliberations. Be sure anybody who will be involved with any part of the process has access to this document and they read it thoroughly so the guidelines and parameters can be met upon presenting samples, bid submissions and at evaluation week.

Contact information:

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Per the Invitation, questions will go to Mashonda. There are a couple of things that require the use of the email address associated with Dr. Fair, but that is detailed and specific in the Invitation. Be sure information is emailed to the right email address.

Dr. Fair closed by saying she hoped the information was informative, helpful and clear. She stressed the deadline for questions is the 23rd (March). Spend time going through the Invitation to determine questions before the deadline.

Questions

Q: A question about the Invitation and recording

A: The Invitation has already been sent out (on NC Publishers' Registry) and one was sent recently this week because there was an update to show the meeting would be virtual only. The Invitation will always be on the textbook adoption web page. Go there to get the Invitation at this point. This recording (of this meeting) will be posted on the meetings page and the publishers' page so go there and click on a link for that as well as the presentation slides used today. Whenever the minutes (notes) are prepared they will be there as well. All of the materials will be available on the website, specifically on the information for publishers and the meetings page to find the materials sometime after today.

Questions

There were none. Dr. Fair proceeded to end the meeting. She thanked everyone and encouraged everyone to get questions in by the deadline. She wished everyone a great Friday and a great weekend.

Meeting notes taken by: Dr. Carmella Fair