2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina

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

2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina

Table of Contents

Attachments

INTRODUCTION AND REQUIREMENTS

The *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina* initiates the annual evaluation and adoption of textbooks in selected subject categories for use in North Carolina schools. This document, including all attachments, provides an overview of the process for submission, evaluation, and adoption of textbooks. By submitting textbooks for evaluation, publishers and producers agree to follow the procedures set forth in this document**. Failure to comply with all procedures**, **including stated deadlines, will result in disqualification** for the annual evaluation and adoption of textbooks in selected subject categories for use in North Carolina. **The entire Invitation document must be returned with your bid submission.**

Authority for the North Carolina State Board of Education to adopt textbooks is codified in the General Statutes of North Carolina §115C-85 through §115C-102. Only publishers listed on the North Carolina Publishers Registry are allowed to submit textbooks in response to the requirements of this document, and all responses must conform to the specified requirements.

The 2022 textbook evaluation will include the subject grade levels/courses listed on pages 4 – 5. In the cost proposal spreadsheet (see Attachment 4 for a sample), publishers must identify each textbook to be evaluated by title, grade level/course, and ISBN.

As cited in §115C-85, textbook is defined as:
> "…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 non-print, 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."

Technology-based programs may include subscription or web-based materials.

Submission Parameters

1. **Textbook materials may be submitted for any grade level/course the publisher deems appropriate. Cost proposal spreadsheets must clearly state each grade level/course the publisher deems appropriate.**
2. **Publishers must clearly specify the grade levels/courses for any submitted materials prior to submission.**
3. **Textbook materials will only be evaluated for the grade levels/courses specified by the publisher.**
4. **It is the responsibility of the publisher to ensure that each submission is complete and correctly identified. Publishers shall provide sample textbook materials according to the schedule set by the North Carolina Department of Public Instruction. Sample textbook materials that are print materials, shall be provided in electronic PDF format as designated by the North Carolina Department of Public Instruction. Electronic versions of print materials must be complete and have the same format and content as the print versions. Links or URLs and/or access information for electronic materials**

must be provided. All materials must include the identification number that is supplied by the North Carolina Department of Public Instruction.

5. It is the responsibility of the publisher to ensure that each submission is complete and correctly identified. Publishers shall provide 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 provided as designated by the North Carolina Department of Public Instruction. Access information for all technology-based programs or other non-print materials must include the identification number that is supplied by the North Carolina Department of Public Instruction.

6. Publishers submitting technology-based programs or other non-print materials must provide specific instructions on how to navigate all submitted digital materials through their online platform. Navigation instructions may be provided by video or screen cast no longer than 10 minutes in length. A link for access to a video or screen cast with navigation instructions must be submitted through the NC platform for publishers according to the schedule and bid proposal guidelines set by the North Carolina Department of Public Instruction. Access to the instructions must work at all times through November 3, 2022 ~~October 6, 2022~~. Contact information for technical support must be provided in the bid submission.

7. It is the responsibility of the publisher to ensure that each submission is complete and correctly identified. Publishers shall ship sample textbook materials for the DPI official bid samples according to the schedule set by the North Carolina Department of Public Instruction. DPI official bid samples shall be shipped to the Textbook Warehouse. All shipped materials must contain the identification number that is supplied by the North Carolina Department of Public Instruction.

8. Textbook titles will be adopted by the State Board of Education and placed on contract for the Public Schools of North Carolina. Adopted titles are distributed solely through the North Carolina Textbook Warehouse. §115C - 96 (2).

9. As stated in the Standard Textbook Contract (Attachment 1, PART IV (12)), the seller shall not submit for substitution without prior written approval of the North Carolina Department of Public Instruction.

MATERIALS TO BE CONSIDERED

Print and non-print materials will be considered. All materials must be comprehensive in nature and cover the primary goals and objectives of a course or grade level. Other specifications are identified within the "textbook materials review criteria sheets" for each grade level listing. **Only materials that are on the cost proposal spreadsheets will be evaluated and reviewed. Non-bid materials, materials not on the cost proposal spreadsheets, shall not be provided for evaluation. Non-bid materials shall not be provided to any school or school district. No additional materials may be provided as part of any state-adopted textbook package or purchase agreement.**

Alignment to the Standard Course of Study

All submissions for English Language Development (ELD) must be aligned to the goals and objectives of the North Carolina Standard Course of Study for K-12 ELD.

ELD standards are available using the URL below:
[The NC ELD Standard Course of Study](#)

All submissions for social studies must be aligned to the goals and objectives of the North Carolina Standard Course of Study for K-12 Social Studies.

Social Studies K-12 standards are accessible using the URL below:
https://www.dpi.nc.gov/teach-nc/curriculum-instruction/standard-course-study/social-studies

Technology-Based Textbook Materials

Technology-based textbook materials are those basic learning resources that require the availability of electronic equipment. **All components and technical requirements must be listed on the cost proposal spreadsheet.**

TEXTBOOK EVALUATION ADVISORS

The Textbook Commission shall appoint textbook evaluation advisors who will assist with the evaluation of textbook submissions.

Number of Advisors
The Textbook Commission will review the content areas, grade levels and courses under consideration for evaluation and adoption. The total bid submissions will be used to determine the number of advisors.

Orientation and Training
Each advisor participate**s** in an orientation and training session.

Qualifications
Each advisor shall be certified in the area(s) he or she is evaluating materials. Advisors currently teaching in those areas are preferred.

Evaluation
Each advisor will submit to the Textbook Commission a completed "Textbook Materials Review Criteria Sheet" for each textbook evaluated and participate in a debriefing.

CONTENT AREAS FOR TEXTBOOK EVALUATION PROCESS

English Language Development (ELD), Grades K – 12

Kindergarten English Language Development

Grade 1 English Language Development

Grade 2 English Language Development

Grade 3 English Language Development

Grade 4 English Language Development

Grade 5 English Language Development

Grade 6 English Language Development

Grade 7 English Language Development

Grade 8 English Language Development

Grade 9 English Language Development

Grade 10 English Language Development

Grade 11 English Language Development

Grade 12 English Language Development

English Language Development Standards may be accessed on the DPI website:
[The NC ELD Standard Course of Study](#)

CONTENT AREAS FOR TEXTBOOK EVALUATION PROCESS

SOCIAL STUDIES, K-12

Kindergarten Social Studies

Grade 1 Social Studies

Grade 2 Social Studies

Grade 3 Social Studies

Grade 4 Social Studies

Grade 5 Social Studies

Grade 6 Social Studies

Grade 7 Social Studies

Grade 8 Social Studies

Founding Principles of The United States of America and North Carolina: Civic Literacy

American History

World History

Economics and Personal Finance

Social Studies K-12 standards may be seen on the DPI web site:
 https://www.dpi.nc.gov/teach-nc/curriculum-instruction/standard-course-study/social-studies

TENTATIVE SCHEDULE FOR 2022 ADOPTION PROCESS
Updated September 15, 2022

February 16, 2022   Textbook Commission Planning Meeting – The meeting provides ethics and initial training for Commission members. **This meeting is virtual only.**
Meeting link: https://bit.ly/Feb2022mtg (This meeting was canceled.)

March 2, 2022   Presentation to the State Board of Education (SBE) – The Department of Public Instruction (DPI) presents a review of the textbook adoption process and a draft of the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina*. Item is presented as Action on First Reading.

March 3, 2022   Proposed SBE Approval of the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina*.

March 4, 2022   Invitation Announcement– DPI emails publishers and producers who are on the NC Publishers' Registry the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina*.
Website: https://www.dpi.nc.gov/districts-schools/district-operations/textbook-adoption

March 11, 2022   Meeting for Publishers– All publishers on the NC Publishers' Registry are invited to attend a virtual meeting for publishers from 1:00 p.m. – 2:30 p.m. Publishers submitting bids are strongly encouraged to attend. **This meeting is virtual only.**
Meeting link: https://bit.ly/2022PublisherMtg

March 15, 2022   Textbook Commission Content Meeting – Textbook Commission members review content standards and criteria. Location: TBD The meeting may be virtual if conditions at the time are not conducive to safe social distancing in person. Updates about which option is needed will be provided at a later date. (This meeting was canceled and rescheduled for March 28, 2022)

March 21, 2022   Publisher deadline for submitting written questions regarding the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina* is March 21, 2022, 2:00 p.m. (EST).

All questions must be written and submitted to Kyna Brands, Procurement Office, kyna.brands@dpi.nc.gov, by 2:00 p.m. (EST) March 21, 2022.

March 28, 2022   Textbook Commission Content Meeting – Textbook Commission members review content standards and criteria. The meeting is virtual only.

March 29, 2022   All responses to publisher questions will be answered and distributed to publishers.

March 31, 2022   Each bid proposal submission requires an identification number issued by NCDPI. **Interested publishers must send an email request to** nctextbooks@dpi.nc.gov **with the subject line, "Request for Identification Number(s)." Publishers who send this email request will receive access to a bid identification number request form and the cost proposal form.** The request form will require the total number of identification numbers needed and the names and email addresses of contacts who have the authority to submit the electronic bid proposal and bid sample materials.

Requests for bid identification numbers must be received between March 11th – March 31st.

April 13, 2022   Textbook Commission Planning Meeting – Textbook Commission members will plan for the textbook evaluation and adoption. Location: TBD The meeting may be virtual if conditions at the time are not conducive to safe social distancing in person. Updates about which option is needed will be provided at a later date.

April 28, 2022   Electronic and Hard Copy Bids Submitted – **All bids must be submitted electronically and in hard copy format. All bid submissions, electronic and hard copies, must be submitted and received by 2:00 p.m. (EST). Electronic submissions must be submitted through the NC platform for publishers. Sealed hard copies must be mailed to the North Carolina Department of Public Instruction. Submissions shall be in both electronic and hard copy forms as outlined in the Bid Proposal Information Section of this document. NOTE:** *Authority to Submit Bids for Textbooks* **(Attachment 3) must be included with bid submissions.**

April 28, 2022   Electronic and Hard Copy Bids Opened – **Electronic and hard copy bids will be opened. Hard copies will be opened at the North Carolina Department of Public Instruction located in the Education Building at 301 N. Wilmington Street, Raleigh, NC 27601 in room 504 on the 5th floor beginning at 2:00 p.m. (EST).**

Publishers submitting bids must submit bid samples, print and/or technology-based or other non-print materials, electronically in the NC platform for publishers.

May 12, 2022   Textbook Commission Planning Meeting - – Textbook Commission members will plan for the textbook evaluation and adoption. Location: TBD The meeting may be virtual if conditions at the time are not conducive to safe social distancing in person. Updates about which option is needed will be provided at a later date.

May 16, 2022   Bid Submission Samples – Bid submission samples (i.e., DPI Official Sample Copy) and correlations must be received in the North Carolina Textbook Warehouse. The DPI Official Sample Copy must include all items on the cost proposal spreadsheet. **All items must be labeled with the DPI Identification number.**

Official samples of print materials must be submitted to the textbook warehouse in print. Official technology-based or other non-print samples must be submitted to the warehouse on a list with login and access information.

NOTE: DPI Official Sample Copies must not be delivered before May 9th and no later than May 16th.

Electronic bid samples and correlations for evaluation by Textbook Commissioners and Textbook Evaluation Advisors must be submitted through the NC platform for publishers.

June 11, 2022   Publisher Presentations – Publishers may present to the Textbook Commission relevant information of their submissions. (This date was changed from June 12.) Location: Homewood Suites, 201 Centreport Drive, Greensboro, NC).

June 12, 2022	~~Publisher Presentations – Publishers may present to the Textbook Commission relevant information of their submissions.~~
	Evaluation Training – DPI provides training for commission members and advisors.
	Location: Embassy Suites Greensboro Airport, 204 Centreport Drive, Greensboro, NC
	~~Events may be virtual if conditions at the time are not conducive to safe social distancing in person. Updates about which option is needed will be provided at a later date.~~
	Update: Events for commissioners and advisors will be in-person at the location above on June 12 – 13.
June 13 – 17, 2022	Evaluation Training – DPI provides training for commission members and advisors.
	Evaluation Sessions – The Textbook Commission members will facilitate the review of publishers' materials by evaluators.
	Location: Embassy Suites Greensboro Airport, 204 Centreport Drive, Greensboro, NC
	Events may be virtual if conditions at the time are not conducive to safe social distancing in person. Updates about which option is needed will be provided at a later date.
	Update: Events for commissioners and advisors will be in-person on June 12 – 13 at the Embassy Suites. Advisors will work remotely using a virtual platform June 14 – 17 while commissioners will work and meet on site at the Embassy Suites including working virtually with advisors during those days.
August 3, 2022	Textbook Commission Planning Meeting – Textbook Commission meets to discuss textbook evaluations and reports and to prepare for the deliberations and reconsiderations meeting.
~~**August 3 – 4, 2022**~~	~~Deliberations and Reconsiderations Meeting .~~
~~**August 18, 2022**~~	~~Recommended List Publishers will be notified of the recommended list by August 18, 2022.~~
Sept. 19-20, 2022	Deliberations and Reconsiderations Meeting – Textbook Commission meets to formulate a list of materials to be recommended to the SBE.
	Location: Embassy Suites Greensboro Airport, 204 Centreport Drive, Greensboro, NC
	Update: The meeting will be in-person at the location above.
	~~Location: TBD The meeting may be virtual if conditions at the time are not conducive to safe social distancing in person. Updates about which option is needed will be provided at a later date~~.
October 4, 2022	Recommended List– Publishers will be notified of the recommended list by Oct. 4, 2022.
~~**October 5, 2022**~~	~~Recommendations to the SBE Textbook Commission Chair and the Digital Teaching and Learning Director provide the list of recommended materials for the 2022 textbook adoption.~~
~~**October 6, 2022**~~	~~Proposed SBE Approval of Recommendations The SBE reviews the recommendations for the 2022 textbooks and makes decisions regarding adoption.~~

November 3, 2022	<u>Recommendations to the SBE –</u> Textbook Commission Chair and the Digital Teaching and Learning Director provide the list of recommended materials for the 2022 textbook adoption.
<u>**November 3, 2022**</u>	<u>Proposed SBE Approval of Recommendations</u> – The SBE reviews the recommendations for the 2022 textbooks and makes decisions regarding adoption.
~~**November 7, 2022**~~	~~Adopted Materials and Electronic Files~~
December 1, 2022	<u>Adopted Materials and Electronic Files</u> • Publishers must submit adopted materials to the Textbook Warehouse. • Publishers' must submit three additional copies of student editions (for print submissions) to the Textbook Warehouse. • Publishers must deliver required electronic files to the Textbook Warehouse or the National Instructional Materials Access Center NIMAC (Attachment 7). • Publishers must submit teacher editions of adopted materials to teacher education programs of public and private institutions. (See ~~page 23~~ **page 24** of Invitation.)
Due date communicated in a letter to publishers who have materials on the adopted list	<u>Contracts, Surety Bonds, and Signed Affidavits</u> – Publisher contracts, surety bonds, and signed affidavits must be submitted and received by the Procurement Office at the North Carolina Department of Public Instruction by 2:00 p.m. (EST) on the due date (Attachments 1, 2, and 8).

Note: Information about the Textbook Commission meetings is available on the <u>Textbook Commission Meetings web page</u>.

BID PROPOSAL INFORMATION

Bid Submissions   Bids will be submitted electronically through the NC platform for publishers and by hard copy in the mail. Envelopes in which hard copies of bids are submitted shall include the publisher's name and be plainly marked on the outside, "Textbook Bid." All pages of the cost proposal spreadsheet must be included in the submissions (electronic and hard copies). One copy of each of the following will be required for electronic and hard copy submissions:

- Submit the signed original of the completed Bid Proposal. The entire *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina* solicitation document must be returned with your bid proposal, including these completed documents:
  - A transmittal letter
  - Authority to Submit Bids for Textbooks (Attachment 3)
- Submit the completed cost proposal spreadsheet with the costs.
- Submit the completed cost proposal spreadsheet without the costs.
- Submit a USB flash drive with the hard copy submission. Files on the flash drive shall not be password-protected and shall be capable of being copied to other media including Microsoft Word and/or Microsoft Excel and must include the following:
  - A signed, original copy of the Bid Proposal
  - The cost proposal spreadsheet with the costs included. This file should be an Excel spreadsheet.
  - The cost proposal spreadsheet without the costs. This file should be an Excel spreadsheet.

Send submissions to:

Please note that the U.S. Postal Service does not deliver any mail (U.S. Postal Express, Certified, Priority, Overnight, etc.) on a set delivery schedule to this office. <u>It is the responsibility of the publisher to have the bid in this office by the specified time and date of opening.</u>

DELIVERY INFORMATION:
2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina
NC Department of Public Instruction
Attn: Dr. Carmella Fair, Digital Teaching and Learning
301 N Wilmington Street
Raleigh, NC 27601

Transmittal Letter

Each Bid Proposal must be accompanied by a letter of transmittal that:
- Identifies the submitting organization;
- Identifies the name, title, telephone and fax number, along with an e-mail address of the person authorized by the organization to obligate the organization contractually;
- Identifies the name, title, telephone and fax number, along with an e-mail address of the person authorized to negotiate the contract on behalf of the organization;
- Identifies the name, title, telephone and fax number, along with an e-mail address of the person to be contacted for clarification;
- Acknowledges receipt of any and all addendums to the Bid Proposal.
- Includes a Conflict of Interest Statement:
  - o Provide a statement that no assistance in preparing the Bid Proposal was received from any current or former employee of the State of North Carolina whose duties relate(d) to this Bid Proposal, unless such assistance was provided by the state employee in his or her official public capacity and that neither such employee nor any member of his or her immediate family has any financial interest in the outcome of this Bid Proposal;
  - o State if the publisher or any employee of the publisher is related by blood or marriage to a State Board member, textbook commission member, state, school district, and/or local level employee. If there are such relationships, list the names and relationships of said parties. Include the position and responsibilities within the publisher's organization of such publisher employees; and state the employing state agency, individual's title at that State Agency, and termination date.

Cost Proposal Spreadsheet

The cost proposal spreadsheet must contain 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 four (4) items considered as Accompanying Student Materials and up to seven (7) items considered as Teacher Enrichment Materials.

Consumable student editions/workbooks requiring annual replacement will be priced on a five-year basis. In years 2-5 of the contract, purchase quantity will be ready for shipment no later than **April 15th** of each year. Quantities exceeding the initial purchase will be available in years 2-5 at a cost equal to the original price divided by five (total number years of contract).

Accompanying Student Materials: The publisher may provide up to a maximum of four (4) items to the LEA as part of the cost of the student or digital edition. The publisher must determine any qualifications on these items, e.g., 'upon request,' 'first year only,' 'life of adoption,' etc., except for the number of items that can be provided at no additional cost (4 items maximum). Items deemed to be inappropriate during evaluation may be disqualified. NOTE: If no qualifications are stated, it will be assumed that the item will be provided at no additional charge for each year of the life of the adoption.

Teacher Enrichment Materials: The publisher may provide up to a maximum of seven (7) items to the LEA per classroom (15 student minimum) at no additional cost (above the cost of the student or digital editions). As the class size increases over the 15-student minimum, the

publisher may increase the number of enrichment materials provided based on an increment of textbook purchases to be determined by the publisher, i.e., 3 additional students (class size 18) will result in one additional enrichment material item to be provided. The increment determined by the publisher must be stated on the Cost Proposal spreadsheet and may not be changed once the bid is submitted. The publisher must determine any qualifications on these items, e.g., 'upon request,' 'first year only,' 'life of adoption,' etc., except for the number of items that can be provided at no additional cost (7 items plus increments if applicable). Items deemed to be inappropriate during evaluation may be disqualified. NOTE: If no qualifications are stated, it will be assumed that the item will be provided at no additional charge for the life of the adoption.

Additional copies of Accompanying Student Materials and Teacher Enrichment Materials will be ordered directly from the publisher by the LEA.

Cost Calculation

Publishers shall calculate the Cost Proposal spreadsheet in accordance with the following process (Attachment 4):

(a) *Net wholesale* – Each publisher shall start with the net wholesale price (lowest price available in the United States), free-on-board (f.o.b.) publisher for which the textbook/program will be offered in North Carolina.

(b) *NC Warehouse Allowance* – North Carolina maintains and operates its own textbook warehouse and distributes textbooks to local school systems. An allowance shall be calculated at 8% of the net wholesale price.

(c) *Bid Price* - The warehouse allowance shall be deducted from the net wholesale price to render the net price the State Board of Education will pay for the textbook. This price shall be the bid price (f.o.b. Raleigh, with freight prepaid).

It is understood that bid prices will be calculated at the lowest price given to any state as required by §115C-95 and Part III, Section (9) of the textbook contract.

It is the responsibility of the submitting publisher to assure accuracy and completeness of all information in the bid.

Any price is subject to further reduction during the term of the contract under the terms of paragraph (9) of the proposed contract.

Prohibition of Free Materials

NO FREE MATERIALS. All bid materials must be listed in the Cost Proposal spreadsheet. **NOTE: Items that do not have intellectual content may not be given as free materials. Examples of free materials include, but are not limited to, electronic or computer hardware (including tablets), microscopes, carts, standard electronic equipment (DVD players, projectors, document cameras, interactive whiteboards, phone/music/data transmitting and listening devices, and digital cameras).**

BID SAMPLE INFORMATION

Bid Samples   Publishers must provide bid samples for evaluation to NCDPI through the NC platform for publishers. **NCDPI will provide access to the NC platform for publishers to all publishers who request identification numbers to submit bids.**

All bid samples must be complete unless otherwise approved by Textbook Adoption Services. If a submission includes a classroom kit or library with multiple copies of the same materials, a sampler may be created with only **one** copy of each of the items. **Samples must be provided electronically to NCDPI through the NC platform for publishers no earlier than May 9th and no later than May 16th.**

Sample textbook materials that are print materials, shall be provided in electronic PDF format as designated by the North Carolina Department of Public Instruction. Electronic versions of print materials must be complete and have the same format and content as the print versions. Links or URLs and/or access information for electronic materials must be provided. All materials must include the identification number that is supplied by the North Carolina Department of Public Instruction.

Technology-based programs/non-print samples   Each technology-based program or other non-print sample must be submitted through the NC platform for publishers. Each sample much include the publisher's name, the DPI identification number, and the appropriate grade level or course. Each sample must include appropriate working links with explicit details of how to access, login and navigate the sample. It is the responsibility of the publisher to ensure links and login information work at all times through **November 3, 2022** ~~October 6, 2022~~. Publishers must provide contact information for support in the form through the NC platform for publishers.

Navigation Instructions   **Publishers submitting technology-based programs or other non-print materials must provide specific instructions on how to navigate all submitted digital materials through their online platform. Navigation instructions may be provided by video or screen cast no longer than 10 minutes in length. A link for access to a video or screen cast with navigation instructions must be submitted to through the NC platform for publishers according to the schedule and bid proposal guidelines set by the North Carolina Department of Public Instruction. Access to the instructions must work at all times through November 3, 2022 ~~October 6, 2022~~. Contact information for technical support must be provided in the bid submission.**

ALL inquiries regarding the electronic submission of materials through the NC platform for publishers must be directed to:

> Dr. Carmella Fair
> NC Department of Public Instruction
> Instructional Resource Consultant
> Division of Digital Teaching and Learning
> Telephone: (984) 236-2949
> nctextbooks@dpi.nc.gov

* Publishers are responsible for including the DPI identification number assigned by the North Carolina Department of Public Instruction with each bid submission, the ISBN and grade level/course title. The identification numbers will be provided to the publisher upon electronic request using a bid identification requests form by the stated deadline. **NOTE: The identification number, ISBN, and grade level/course title are required for all submission types.**

DPI Official Bid Samples

The DPI official bid samples (i.e., DPI Official Sample Copy) are due no earlier than May 9th and no later than May 16th. DPI official bid samples must include all bid items listed on the cost proposal spreadsheet (print, technology-based and other non-print samples). If a sample contains multiple copies of the same item, one copy may be sent as the official sample copy. Each sample shall be sent to the Textbook Warehouse and labeled as follows:

> **DPI OFFICIAL SAMPLE COPY**
> Submitted for and on the behalf of
> _____ (Publisher)
> 2022 North Carolina Adoption
> * DPI Identification Number/ISBN
> *Grade Level/Course Title

Maximum Weight of Sample Boxes - 25 lbs. ISBN must be identical to bid submissions.

Shipping labels may be reproduced as is or on other computer compatible labels at least 1 1/2" x 4". All information on sample label must be included. Affix labels to the side of shipping box so it can be seen if boxes are stacked.

Each technology-based program or other non-print sample must be listed on a document, and each must include the label information described above and appropriate working links with explicit details of how to access, login and navigate the sample. It is the responsibility of the publisher to ensure links and login information work at all times through **November 3, 2022** ~~October 6, 2022~~.

Technology-based programs/non-print samples

Publishers submitting technology-based programs or other non-print materials must provide specific instructions on how to navigate all submitted digital materials through their online platform. Navigation instructions may be provided by video or screen cast no longer than 10 minutes in length. A link for access to a video or screen cast with navigation instructions must be submitted through the NC platform for publishers according to the schedule and bid proposal guidelines set by the North Carolina Department of Public Instruction. Access to the instructions must work at all times through November 3, 2022 ~~**October 6, 2022**~~**. Contact information for technical support must be provided in the bid submission.**

Mailing boxes shall be accurately marked on the outside of each box. DO NOT SEND unmarked boxes.
Send DPI Official Bid Samples to:

> Judy Blount
> Textbook Warehouse
> 3905 Reedy Creek Road
> Raleigh, NC 27607

PLEASE NOTE: ONLY THE DPI OFFICIAL BID SAMPLES are to be sent to the above address for the Textbook Warehouse.

ALL inquiries regarding directions for packing and shipping must be directed to:

> Dr. Carmella Fair
> NC Department of Public Instruction
> Instructional Resource Consultant
> Division of Digital Teaching and Learning
> Textbook Adoption Services
> Telephone: (984) 236-2949
> nctextbooks@dpi.nc.gov

Form B must be completed and attached to the DPI Official Sample Copy for each print component of textbook materials submitted as a single title or as a part of a comprehensive program. North Carolina employs the standards for textbooks as prescribed in the *Manufacturing Standards and Specifications for Textbooks* developed by the State Instructional Materials Review Association (SIMRA), formerly known as the National Association of State Textbook Administrators (NASTA). (See Attachment 5.)

Form M shall be completed for all technology-based programs and other non-print materials. Technology-based program components that accompany the student edition may consist of software and/or hardware. (See Attachment 6.)

FORM B and M (Manufacturing Specifications) must be included with the official sample copy and an original signature must be used on FORM B and on Form M for the official sample copy.

Student Editions and Electronic Files

Once a textbook is adopted, three additional student editions of each SBE-adopted bid item must be submitted (for print submissions) according to the schedule set by the North Carolina Department of Public Instruction and labeled as follows:

| **DPI OFFICIAL SAMPLE COPY** |
| Submitted for and on the behalf of |
| _____(Publisher) |
| 2022 North Carolina Adoption |
| * DPI Identification Number/ISBN |
| *Grade Level/Course Title |

Maximum Weight of Sample Boxes - 25 lbs. ISBN must be identical to bid submissions.
Shipping labels may be reproduced as is or on other computer compatible labels at least 1 1/2" x 4". All information on sample label must be included. Affix labels to the side of shipping box so it can be seen if boxes are stacked.

Send three additional student editions (for print submissions) according to the schedule set by the North Carolina Department of Public Instruction to:

> Wanda Benson
> Textbook Warehouse
> 309 Chapanoke Road
> Raleigh, NC 27603

Publishers of SBE-adopted textbook materials shall provide **accessible electronic files** as specified in the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina.* (Attachment 7).

Publishers shall grant permission to the State to have adopted textbook materials transcribed into braille, large type and audiotape without penalty or royalty. Electronic files may also be copied and distributed to a school district upon request for instructional use with a student with disabilities who requires the use of electronic textbook materials, pursuant to an individualized plan developed for the student under the Americans with Disabilities Act, or the Individuals with Disabilities Education Act.

Required electronic files for **adopted textbook materials** must be submitted by December 1, 2022 to:

> Amy Hobgood
> amy.hobgood@dpi.nc.gov

NOTE: If you send electronic files to NIMAS, please notify NCDPI, by sending an email to: Amy Hobgood (amy.hobgood@dpi.nc.gov) and to nctextbooks@dpi.nc.gov.

EVALUATION, DELIBERATION, AND RECONSIDERATION

These meetings may be virtual if conditions at the time are not conducive to safe social distancing in person. The guidelines below address in person and virtual meeting requirements. Updates about which option is needed will be provided at a later date.

The format of the **evaluation sessions** with commissioners and advisors will be hybrid with in-person and virtual parts. DPI will provide in-person training for advisors for two days as updated in the tentative schedule and the advisors will continue evaluations remotely for the remainder of the week. **Instructions for evaluation materials, print materials, technology-based programs or other non-print materials, navigation instructions, correlations, and screening committee will remain as outlined for "virtual meeting"**. Publisher's presentations will be in-person.

Publishers must provide textbook evaluation materials using the NC platform for publishers provided by NCDPI. A username and/or password must be provided if required to access materials. Publishers must also provide navigation instructions for technology-based or other non-print materials. It is the responsibility of the publisher to ensure that each submission is complete and correctly identified. **Contact information for technical support must be provided.**

In Person Meeting		Virtual Meeting
Evaluation Displays (Required)		**Evaluation Materials (Required)**
Publishers must set up textbook materials and hardware at the evaluation location and must check in at the textbook evaluation registration area.		Publishers must provide textbook evaluation materials using the NC platform for publishers provided by NCDPI. Publishers must also provide navigation instructions for technology-based or other non-print materials. It is the responsibility of the publisher to ensure that each submission is complete and correctly identified.
Publishers, not hotel personnel, are responsible for having materials and hardware on site and set up between 9:00 a.m. until 12:00 p.m. (noon) (EST) on Sunday, June 12th. Prior arrangements must be made with hotel management before any shipments will be accepted by the hotel. No shipments may be sent more than three days prior to June 12th.		**Publishers are responsible for providing access information with the appropriate bid number for all items. Contact information for technical support must be provided.**
Oversized displays are not allowed due to limited space. The materials should be easily located and displayed on tabletops only. Banners may be used if the banner includes company name only. Only bid materials may be displayed - no candy, catalogs, price lists, or address information may be included on the display table.		Each publisher participating in the evaluation and adoption process shall provide: 1. Copies of all materials that are listed on the cost proposal spreadsheet**.** If multiple items are part of a bid submission and an item is not available for review**, that item will be omitted** from the evaluation process, and it will be deleted from the cost proposal spreadsheet. If the omitted item is deemed substantial, the entire bid **submission will be disqualified** by the Textbook Commission.
Publishers are responsible for labeling all items and access information lists on display with the appropriate bid number. Publishers who do not have materials and hardware set up and checked in by a Textbook Commission member may be disqualified.		
The North Carolina Department of Public Instruction and the Textbook Commission shall provide space to display submitted materials. Tables will be assigned.		2. Contact information for technical and navigation

~~Each publisher participating in the evaluation and adoption process shall provide and set up:~~ 1. ~~Two copies of all materials that are listed on the cost proposal spreadsheet.~~ **~~If multiple items are part of a bid submission and an item is not available for review,~~** **~~that item will be omitted~~** ~~from the evaluation process, and it will be deleted from the cost proposal spreadsheet. If the omitted item is deemed substantial, the entire bid~~ **~~submission may be disqualified~~** ~~by the Textbook Commission.~~ 2. ~~Two sets per category of all appropriate equipment to demonstrate submitted materials. It is the responsibility of the publisher to arrange equipment and internet access for technology-based items.~~ **~~Electrical requirements are the responsibility of the publisher. Please contact the hotel directly.~~** ~~Contact information for technical and navigation support during the times of the evaluation by athe Textbook Commission and Textbook Evaluation Advisors.~~ 3. ~~Two copies of appropriate correlations are required.~~ **~~If two correlations are not available, materials may be disqualified.~~** ~~If multiple items are part of a bid submission and an item is not available for review,~~ **~~that item will be omitted~~** ~~from the evaluation process and will no longer be considered. If the omitted item is deemed substantial, the entire bid submission~~ **~~may be disqualified~~** ~~by the Textbook Commission.~~ **~~NOTE: At no time during display set-up or breakdown shall publishers discuss bid submissions, materials, process, voting, or feedback with Textbook Commission members or advisors who may be on the premises. Questions concerning the displays may be directed to the North Carolina Department of Public Instruction staff.~~**		support during the times of evaluation by the Textbook Commissioners and Textbook Evaluation Advisors. 3. Appropriate correlations are required. **If correlations are not available, materials may be disqualified.** If multiple items are part of a bid submission and an item is not available for review, **that item will be omitted** from the evaluation process and will no longer be considered. If the omitted item is deemed substantial, the entire bid submission **will be disqualified** by the Textbook Commission.
In Person Meeting		**Virtual Meeting**
Print materials ~~See details in section above about evaluation displays.~~		**Print materials** **Textbook materials that are print materials, shall be provided in electronic PDF format as designated by the North Carolina Department of Public Instruction. Electronic versions of print materials must be complete and have the same format and content as the print versions. Links and URLs and/or access information for electronic materials must be provided. A username and/or password must be provided if required. All**

		~~materials must include the identification number that is provided by the North Carolina Department of Public Instruction.~~ **materials must include the identification number that is provided by the North Carolina Department of Public Instruction.**
In Person Meeting		**Virtual Meeting**
~~Technology-based programs or other non-print materials~~ ~~Publishers shall provide access information for technology-based programs or other non-print materials as designated by the North Carolina Department of Public Instruction. Access information for all technology-based programs or other non-print materials must include the identification number that is supplied by the North Carolina Department of Public Instruction. A username and/or password must be provided if required.~~		**Technology-based programs or other non-print materials** **Publishers shall provide access information for technology-based programs or other non-print materials as designated by the North Carolina Department of Public Instruction. Access information for all technology-based programs or other non-print materials must include the identification number that is supplied by the North Carolina Department of Public Instruction. A username and/or password must be provided if required.**
In Person Meeting		**Virtual Meeting**
~~Navigation Instructions~~ ~~Publishers submitting technology-based programs or other non-print materials must provide specific instructions on how to navigate all submitted digital materials through their online platform. Navigation instructions may be provided by video or screen cast no longer than 10 minutes in length A link for access to a video or screen cast with navigation instructions must be submitted through the NC platform for publishers according to the schedule and bid proposal guidelines set by the North Carolina Department of Public Instruction. Access to the instructions must work at all times through November 3, 2022 (October 6, 2022). Contact information for technical support must be provided in the bid submission.~~		**Navigation Instructions** **Publishers submitting technology-based programs or other non-print materials must provide specific instructions on how to navigate all submitted digital materials through their online platform. Navigation instructions may be provided by video or screen cast no longer than 10 minutes in length A link for access to a video or screen cast with navigation instructions must be submitted through the NC platform for publishers according to the schedule and bid proposal guidelines set by the North Carolina Department of Public Instruction. Access to the instructions must work at all times through November 3, 2022** ~~October 6, 2022~~**. Contact information for technical support must be provided in the bid submission.**
In Person Meeting		**Virtual Meeting**
~~Correlations (Required)~~ ~~Correlations to the North Carolina Standard Course of Study for English Language Development are required for each appropriate submission and must be accompanied with all bid materials.~~ ~~Correlations to the North Carolina Standard Course of Study for Social Studies are required for each appropriate submission and must be accompanied with all bid materials.~~ ~~It is the publisher's responsibility to ensure the accuracy of the correlations. Publishers who submit inaccurate~~		**Correlations (Required)** **Correlations to the North Carolina Standard Course of Study for English Language Development are required for each appropriate submission and must be accompanied with all bid materials submitted through the NC platform for publishers.** **Correlations to the North Carolina Standard Course of Study for Social Studies are required for each appropriate submission and must be accompanied with all bid materials submitted through the NC platform for publishers.**

~~correlations may be disqualified. The correlations are used by advisors, Commission members, and other educators and should be worded appropriately.~~		It is the publisher's responsibility to ensure the accuracy of the correlations. Publishers who submit inaccurate correlations may be disqualified. The correlations are used by advisors, Commission members, and other educators and should be worded appropriately.
In Person Meeting		**Virtual Meeting**
<u>**Screening Committee**</u>		<u>**Screening Committee**</u>
~~At the evaluation site, a screening committee appointed by the Textbook Commission Chairperson or Co-Chairperson will examine materials in the displays to determine if submissions are in compliance with terms of the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina.*~~ **It is the responsibility of the publisher to ensure that submissions are complete, that all items listed on the cost proposal spreadsheet are displayed for evaluation and displays are labeled appropriately.** ~~The Textbook Commission assumes no responsibility for assuring that all bid items are displayed.~~ ~~**Publishers are responsible for labeling all items on display with the appropriate bid number. Publishers who do not have materials and hardware set up and checked in by a Textbook Commission member may be disqualified.**~~ ~~Bid submissions not in compliance with the *2022 Invitation to Submit Textbook for Evaluation and Adoption in North Carolina* will be removed from the display and the submission may be disqualified from consideration.~~ ~~**Before leaving display areas, publishers are responsible for following Textbook Commission checkout procedures.**~~		A screening committee appointed by the Textbook Commission Chairperson or Co-Chairperson will examine materials submitted for evaluation to determine if submissions are in compliance with terms of the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina.* **It is the responsibility of the publisher to ensure that submissions are complete, that all items listed on the cost proposal spreadsheet are provided for evaluation and are labeled appropriately.** The Textbook Commission assumes no responsibility for assuring that all bid items are submitted. **Publishers are responsible for labeling <u>all</u> items with the appropriate <u>bid number</u>.** Bid submissions not in compliance with the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina* will be disqualified from consideration.
In Person Meeting		**Virtual Meeting**
Publishers Presentations (Optional)		**Publishers Presentations (Optional)**
Publishers may present to Textbook Commission members. There will be no question/answer session during the presentation. Publishers who submit bid submissions as described in this document will receive an email with a link to a form to indicate interest in presenting to the Commission. Presentation schedules will be emailed to interested publishers who complete the form. **NOTE: For publishers who opt to present to the Textbook Commission, at no time during the presentation shall publishers discuss bid submissions, materials, process, or voting with Textbook**		Publishers may present to Textbook Commission members. There will be no question/answer session during the presentation. Publishers who submit bid submissions as described in this document will receive an email with a link to a form to indicate interest in presenting to the Commission. Presentation schedules will be emailed to interested publishers who complete the form. **NOTE: For publishers who opt to present to the Textbook Commission, at no time during the presentation shall publishers discuss bid submissions, materials, process, or voting with Textbook Commission**

In Person Meeting	Virtual Meeting
Commission members or others who may be in attendance for the premises. Questions concerning the presentations may be directed to the North Carolina Department of Public Instruction staff. **NOTE**: No prices shall be displayed or distributed during the publisher presentation. Any materials distributed during the presentation must be taken up at the conclusion of the presentation.	**members or others who may be in attendance for the premises. Questions concerning the presentations may be directed to the North Carolina Department of Public Instruction staff.** **Note:** No prices shall be displayed or discussed during the publisher presentation.
In Person Meeting	**Virtual Meeting**
<u>**Evaluation of Textbook Materials**</u> The Textbook Commission members and advisors will evaluate all submitted materials using the criteria sheets included in this document for each grade level/course.	<u>**Evaluation of Textbook Materials**</u> The Textbook Commission members and advisors will evaluate all submitted materials using the criteria sheets included in this document for each grade level/course.
In Person Meeting	**Virtual Meeting**
<u>~~**Display Removal (Required)**~~</u> ~~Publishers will take down displays, box materials, and remove equipment **between 2:00 p.m. and 4:00 p.m. (EST) on the designated date.** Materials and equipment left after 4:00 p.m. (EST) on the designated date will be removed and disposed of at publisher's expense. **Publishers must make independent computer rental companies aware of this policy before leaving the evaluation location.**~~ ~~**NOTE: At no time during display set-up or breakdown shall publishers discuss bid submissions, materials, process, voting, or feedback with Textbook Commission members or advisors who may be on the premises. Questions concerning the displays may be directed to the North Carolina Department of Public Instruction staff.**~~	
In Person Meeting	**Virtual Meeting**
<u>**Deliberations and Publisher Reconsideration**</u> The Textbook Commission will meet to formulate a list of textbooks to be recommended to the State Board of Education. A period of time shall be set aside for the Textbook Commission to meet and deliberate before a list of textbook recommendations is taken to the State Board of Education for adoption. The following outlines the deliberations and reconsideration process. 1. The Textbook Commission shall meet to deliberate recommendations to be presented to the State Board of Education. 2. At the conclusion of deliberations, each publisher whose submission(s) have not been recommended will	<u>~~**Deliberations and Publisher Reconsideration**~~</u> ~~The Textbook Commission will meet to formulate a list of textbooks to be recommended to the State Board of Education. A period of time shall be set aside for the Textbook Commission to meet and deliberate before a list of textbook recommendations is taken to the State Board of Education for adoption. The following outlines the deliberations and reconsideration process.~~ ~~1. The Textbook Commission shall meet to deliberate recommendations to be presented to the State Board of Education.~~ ~~2. At the conclusion of deliberations, each publisher whose submissions have not been recommended will have the~~

have the opportunity to provide clarification on, without changing, submitted information that might assist the Textbook Commission in re-assessing its recommendation. This clarification information shall be presented verbally to the Commission and may include the use of any equipment, materials, or handouts needed to demonstrate the information.

If publishers need more clarification about the reconsideration process, the Textbook Commission will advise those who wish to be heard about the format for the verbal presentation.

Publishers who want reconsideration for submissions not recommended must use the link for the reconsideration form provided virtually at the end of the deliberations meeting. Publishers presenting for reconsideration will be given a length of time to present based on the number of items for reconsideration. Publishers will present using their own device.

After hearing the clarification information, the Textbook Commission votes to recommend/not recommend the submission(s) and advises the publisher immediately of the decision. Documentation by the Commission, citing reasons of the decision, will accompany reports of "not recommended" titles. **Failure of a publisher to appear at the Textbook Commission Deliberations meeting and make a verbal appeal for reconsideration shall prohibit the publisher from taking part in the Reconsideration process.**

3. All submitting publishers shall be notified by the North Carolina Department of Public Instruction within two weeks after the Deliberations and Reconsideration process of the recommendations to the State Board of Education.

4. A publishing company shall not contact any State Board member personally to discuss the reconsideration of a Textbook Commission recommendation.

5. All adoption decisions made by the State Board of Education shall be final.

STATE BOARD OF EDUCATION TEXTBOOK MATERIAL RECOMMENDATIONS AND CONTRACT REQUIREMENTS

Textbooks recommended to SBE   The Commission Chair and State Textbook Director present the list of recommended materials for the 2022 Textbook Adoption to the State Board of Education.

The State Board of Education will determine which contracts will be awarded at the State Board meeting. Bid submissions will be adopted and contracts awarded by the State Board based upon the:
- Recommendations of the Textbook Commission,
- Conformity with the requirements for submission of materials and proposed contract contained herein,
- Conformity with the *North Carolina Standard Course of Study,*
- Price, and
- Needs of the public schools.

Reservations of Rights   The State Board of Education reserves the right to reject any and all bids, to waive any formality in bids, and unless otherwise specified, to accept any item in the bid.

A publisher may withdraw from consideration of bid submission at any time prior to evaluation of materials. A letter of withdrawal shall be submitted to the Textbook Adoptions Services addressed to the attention of:
> Dr. Carmella Fair
> NC Department of Public Instruction
> Instructional Resource Consultant
> Division of Digital Teaching and Learning
> Textbook Adoption Services
> 6307 Mail Service Center
> Raleigh, NC 27699-6307

An officer of the submitting company shall sign any letter of withdrawal.

Contract Terms   All contracts awarded will be similar to the sample contract (Attachment 1). Current textbook contracts, which list materials being submitted in the current adoption, will be valid, and prices will remain in effect until contract expiration. Attachment 1), Textbook Contract, Part VII (20), Continuations of Rights.

Upon adoption of the textbooks at the State Board meeting, all sales will be handled through the Textbook Warehouse. Contracts are in effect for five years and may be extended for additional years as outlined in textbook general statutes.

Delivery   *Time of Delivery:* If the seller fails to deliver state-adopted materials within forty-five (45) calendar days of the date an order is placed by the State Board, fines

will be assessed at the rate of $100.00 per day per title for each day's delay in the receipt of materials. See Part V (15) of contract (Attachment 1).

Substitutions   *Revised or Later Copyrighted Editions:* The seller shall not submit for substitution without prior written approval of the Textbook Adoption Director. The primary criterion for approval of a substitution is that the two editions may be used in the same classroom without undue inconvenience or disruption to the teacher or students.

Classroom and IHE Teacher Editions   Publishers awarded contracts will be required to provide, at no cost, one teacher edition for each adopted textbook for each teacher using that textbook in the classroom (Attachment 1 - PART II (3)).
Colleges with Teacher Education Programs: One teacher edition for each adopted textbook shall be provided to each college with a teacher education department approved by the North Carolina Department of Public Instruction. If no teacher edition is available, then a student edition shall be provided to each college with a teacher education department (Attachment 1 - PART II (3)).

Contracts and Surety Bond   *Surety Bond Required:* A surety bond in the amount of **$3,000.00 for each adopted submission** will be required as indicated in Part II, Section 7 of the North Carolina State Board of Education Textbook Contract and in §115C – 89 (Attachment 2).

Publishers submit contracts and surety bonds (Attachments 1 and 2) to Amy Hobgood ~~Kyna Brands~~ at NCDPI, Division of Digital Learning & Technology Services ~~Procurement Office~~ by date communicated in a letter to publishers who have materials on the adopted list.

Signed Affidavit   Publisher's signed affidavit due to Amy Hobgood ~~Kyna Brands~~ at NCDPI, Division of Digital Learning & Technology Services ~~Procurement Office~~ certifying that all materials shipped to North Carolina have been thoroughly examined and are error free (Attachment 8) by date communicated in a letter to publishers who have materials on the adopted list.

SAMPLING PROMOTION OF TEXTBOOKS/PROGRAMS

Neither sampling nor 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 *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina* at its State Board of Education meeting until the day after the Textbook Commission's evaluation sessions with the Textbook Advisors.

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

Only official samples for review and evaluation shall be distributed as described in the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina* during that time period.

PUBLISHER CONTACT WITH STATE BOARD OF EDUCATION AND TEXTBOOK COMMISSION

Prior to award of contracts, publishers, either directly or indirectly, through any officer, agent, employee or representative, shall not contact any officer, agent, employee or representative of the State Board of Education, the Department of Public Instruction, or the Textbook Commission for the purpose of influencing or attempting to influence the evaluation or adoption of its textbooks/programs. The following outlines publisher contact with State Board of Education and Textbook Commission members:

1. The Commission may meet publicly with representatives of publishers to discuss the Commission's plans and procedures for evaluation and adoption of textbooks.

2. At no time during the evaluation and adoption process (from the time the State Board approves the call letter until the State Board adopts the recommended list of textbooks) may the Commission or any of its members meet privately with any publisher's representatives.

3. The State Superintendent of Public Instruction shall remove any publisher from the NC Publishers Register whose representatives attempt to exercise undue pressure of any kind to adopt its books upon a member of the Textbook Commission, the regional textbook evaluation advisory committees, the curriculum review committee, or the staff of the Department of Public Instruction.

4. The State Board of Education shall direct the State Superintendent of Public Instruction to remove from the NC Publishers Registry any publisher whose representatives attempt to exercise "undue pressure" of any form upon a member of the State Board of Education to adopt its books.

For purposes of restrictions, "undue pressure" means personal contact (other than with the Director of Operations and Policy of the State Board of Education or the State Textbook Administrator of the Department of Public Instruction), whether in person, or by telephone, that attempts to advocate for the selection of a particular book or series of books. "Undue pressure" does not include social contact or presentations to the Textbook Commission as a whole and does not include written communication with Textbook Commission members or agency officials following acceptance or rejection of a submission in an effort to seek clarification or reconsideration. (SBE Policy TEXT-006)

ERRORS IN TEXTBOOK MATERIALS

The publisher is responsible for identifying and correcting all errors including those deemed to be significant, factual, or typographical by the SBE, DPI, local boards of education or any of their officials, employees or agents.

Publishers must submit an affidavit stating that the textbook materials submitted for adoption have been proofed for factual and typographical errors and to the best of their knowledge the submissions are error free (Attachment 8).

The sample SBE Textbook Contract outlines specific requirements for monitoring and correcting errors in textbook materials (Attachment 1).

English Language Development
Standards Overview

The NC ELD SCOS is anchored by four *Big Ideas* that are interwoven throughout the standards. Like the Can-Do Philosophy, the *Big Ideas* support the design of standards-based educational experiences that are student-centered, culturally and linguistically sustaining, and responsive to English learners' strengths and needs (WIDA 2020). The four *Big Ideas* are: 1) Equity of Opportunity and Access; 2) Integration of Content and Language; 3) Collaboration Among Stakeholders; and 4) Functional Approach to Language Development.

Equity of Opportunity and Access
English learners come from a wide range of cultural, linguistic, educational, and socioeconomic backgrounds and have many physical, social, emotional, experiential, and/or cognitive differences. All bring assets, potential, and resources to schools that educators must leverage to increase equity in standards-based systems. The NC ELD Standard Course of Study upholds the goal of increasing equity for English learners by providing common and visible language expectations in relation to grade-level academic content. These expectations also serve to increase coherence of policy and practice around the education of English learners at federal, state, and local levels (WIDA 2020).

Integration of Content and Language
The NC ELD Standard Course of Study represents the integration of content and language by illustrating explicit and specific content–language connections. English learners develop content and language concurrently, with academic content as a context for language learning and language as a means for learning academic content. The NC ELD Standard Course of Study introduces ways of looking at the integration of content and language, for example, through Key Language Uses, Language Expectations, and Correspondence Tables for Content and Language Standards (WIDA 2020). The integration of content and language for English learners promotes understanding the connections between content and language, making meaning within and across content areas, interaction of students with each other in challenging content activities, and coordination of design and delivery of curriculum, instruction, and assessment.

Collaboration Among Stakeholders
Districts and schools are complex educational systems with collaboration extending across stakeholders from classrooms, to schools, districts, and the families and communities of students. Stakeholders have different areas of expertise and are often responsible for different aspects of educational planning and delivery; however, collectively they are responsible for the success of English learners. The NC ELD Standard Course of Study emphasizes the importance of communication and collaboration between ESL teachers and other educators-- including general education teachers, EC specialists, and AIG specialists-- is vital to the success of English learners. Although different classrooms may have different instructional foci, all classrooms

with English learners must incorporate content and language development. Content teachers bring expertise in their discipline, while language teachers bring expertise in language development (WIDA 2020).

Functional Approach to Language Development
The ELD Standard Course of Study illustrates how particular linguistic tools achieve certain purposes. Individuals make choices with language to organize their ideas in particular ways, to convey the relationships among these ideas, and about what types of words are most effective for our message. The explicit teaching of how language works can help English learners expand what they can do with language. The result is that students become increasingly aware and strategic in their use of language to negotiate meaning and achieve their purposes in various contexts (WIDA 2020).

NC ELD Standard Course of Study Framework

The NC ELD Standard Course of Study consists of four components that are the building blocks of language development and range from broad to narrow in scope. The four components work together to make a comprehensive picture of language development:

> *The Five ELD Standards Statements* provide the broadest conceptual framing and illustrate the integration of content and language. The standards statements show language use in the service of learning—in other words, language for thinking and doing. They address the language of schooling. ELD Standard 1: Language for Social and Instructional Purposes, is broader in scope and applicability than the other four ELD Standards Statements that are associated with discipline-specific learning. ELD Standard 1 applies across a range of educational settings and works both independently from and in conjunction with ELD Standards 2-5 (WIDA 2020).

> *The Key Language Uses* describe prominent ways that language is used in school, across all disciplines. When educators make choices about how to integrate content and language, the Key Language Uses can help provide focus and coherence (WIDA 2020). Key Language Uses share some common aspects across disciplines, and yet each discipline also has unique ways of applying each. Below are brief definitions for each Key Language Use:
> - **Narrate** highlights language to convey real or imaginary experiences through stories and histories. Narratives serve many purposes, including to instruct, entertain, teach, or support argumentation.
> - **Inform** highlights language to provide factual information. As students convey information, they define, describe, compare, contrast, organize, categorize, or classify concepts, ideas, or phenomena.

- **Explain** highlights language to give an account for how things work or why things happen. As students explain, they substantiate the inner workings of natural, man-made, and social phenomena.
- **Argue** highlights language to justify claims using evidence and reasoning. Arguments can be used to advance or defend an idea or solution, change the audience's point of view, bring about action, or accept a position or evaluation of an issue.

The Language Expectations set goals for content-driven language learning. They add specificity to the ELD Standards Statements and Key Language Uses and make visible the language associated with the content areas (WIDA 2020). In the Language Expectations, the four individual language domains (listening, speaking, reading, and writing) are consolidated into two more inclusive modes of communication: interpretive and expressive.
- **The interpretive communication mode** encompasses listening, reading, and viewing
- **The expressive communication mode** encompasses speaking, writing, and representing

The Proficiency Level Descriptors (PLDs) describe a continuum of language development for activities that target Language Expectations. They provide a detailed articulation of how students might develop language across the six levels of English language proficiency (WIDA 2020).

About Standard 1
ELD Standard 1, Language for Social and Instructional Purposes, is broader in scope and applicability than the other four ELD Standards Statements that are associated with discipline-specific learning. ELD Standard 1 applies across a range of educational settings, and works both independently from and in conjunction with ELD Standards 2-5. Students communicate to learn but also to convey personal needs and wants, to affirm their own identities, and to form and maintain relationships. ELD Standard 1 encompasses the experiential, linguistic, and cultural backgrounds and identities of English learners in relation to the other ELD Standards. It draws attention to English learners' positioning in the world that informs their meaning-making in the content areas. It reminds educators of strength-based approaches that meet students where they are in their own contexts (WIDA 2020).

Standard 1 encompasses English learners' use of language in the following situations:
- As they expand their linguistic repertoire from English language proficiency level 1 to level 6. ELD Standard 1 is not just for newcomers and young children, and it is not a precursor to learning disciplinary language. Rather, it encompasses opportunities for English learners to develop language for social and instructional purposes at all language proficiency levels, all grade levels, and in all content areas.
- Across all disciplines and school settings. Language for social and instructional purposes is foundational for engagement and learning in every discipline—from core disciplines like language arts and mathematics—to visual and performing arts; health and physical

education; cross-disciplinary endeavors like use of technology, and library/media center time; and schoolwide activities and events. Language is a part of the entire school day and all educators share responsibility for engaging English learners in rich opportunities to simultaneously learn content and language.

- Across numerous topics, tasks, and situations. ELD Standard 1 presents Language Expectations that apply to a range of activities and interactions. Some examples include setting classroom norms; establishing routines; following procedures; asking for clarification; discussing with peers; relating personal ideas, feelings, and views; and exploring languages, cultures, and perspectives.
- While interacting with others. Language is, after all, a social practice that is dependent on an awareness of one's own and others' identities, as well as the unique roles and purposes that participants have in communicating with different members of a learning community—including peers, teachers, administrators, counselors, paraprofessionals, interpreters, family and community liaisons, other support staff, and visitors to the school. Interactive learning increases opportunities for English learners to engage fully in content learning and leverage their assets as support for their academic achievements.

(WIDA 2020)

Adapted from WIDA English Language Development Standards Framework, 2020 Edition ©

Instructional Materials Review Criteria Sheet - English Language Development (K-5)

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____ COPYRIGHT DATE_____

AUTHOR(S)_____ISBN_____

ADVISOR_____ _____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate the appropriate grade:

Grade K _____   **Grade 1** _____   **Grade 2** _____

Grade 3 _____   **Grade 4** _____   **Grade 5** _____

PART I CONTENT

Compatibility with the NC Standard Course of Study (NCSCoS) for English Language Development (ELD). *In accordance with State Board Policy TEXT-001, all items in Part I must be marked "yes" in order for the submission to be recommended.*

Answer yes to indicate the materials <u>meet the criteria</u> or no to indicate the materials <u>do not meet the criteria</u>.
Please explain your responses. Be sure to cite specific page numbers and textual references from the textbook as well as specific standards from the ELD NCSCoS.

	Yes	*No*
A. Materials present main concepts that support a minimum of **80%** of the grade-band Language Expectations (e.g., K, Grade 1, Grades 2-3, Grades 4-5) in the NCSCOS for English Language Development (ELD).		
B. Content, instructional tools, and assessment tools are consistent with the four Big Ideas and five ELD Standards Statements as well as the Language Expectations, and Proficiency Level Descriptors (PLD) of the *NC Standard Course of Study for English Language Development* for the appropriate grade-level (K, 1)/grade-band (Grades 2-3, Grades 4-5).		
C. Content and materials represent a wide range of cultural and linguistic backgrounds, real-life connections (e.g., objects, models, representations, multimodal texts), and represent the integration of content and language by illustrating explicit and specific content-language connections.		
D. Materials provide for the use of technology, including for assistive purposes (e.g., dictionaries, glossaries, screen readers, etc.) and for supporting expression and communication.		
E. Materials include teacher resources, which provide information and		

	Yes	No
opportunities for both content teachers and language teachers, to increase their own understanding of the concepts specific to English Language Development (ELD).		
Comments for Part I Content:		

PART II PEDAGOGY

Please provide evidence of the following:

	Yes	*No*
A. Materials provide for the integration of a multimodal and functional approach to language instruction including interpretative (listening, reading, and viewing) and expressive (speaking, writing, and representing) modes of communication.		
B. Materials include instructional activities and strategies that offer multiple means to opportunities for students to narrate, inform, explain, and argue.		
C. Materials promote the integration of content and language in linguistically and culturally sustaining ways, including connecting ELD standards to academic content standards and representing social and instructional language (e.g., narratives, informational texts, mathematical informational texts, informational texts in social studies). *Note: In Kindergarten, the materials that promote interpreting and constructing texts should be with support from the teacher.*		
D. Materials represent an asset-based approach, leverage a wide range of cultural and linguistic backgrounds.		
E. Materials provide access to grade-level content, systematically include scaffolding that builds student autonomy and supports students to progress from one proficiency level to the next, and are linguistically and developmentally appropriate.		
F. Materials foster students' understanding and working knowledge of interpretive and expressive communication modes, including: ○ organization of language (how coherent texts are created) ○ cohesion of language (how ideas are connected across whole text) ○ density of language (how ideas are elaborated or condensed) ○ grammatical complexity (how meanings are extended or enhanced at the sentence dimension) ○ precision of language (how precise meanings are created through everyday, cross-disciplinary, and technical language at the word and phrase dimensions).		
G. Materials address academic language features at the discourse, sentence, and word and phrase dimensions in a consistent manner for all identified proficiency levels.		
H. Key concepts, skills, and vocabulary are identified, developed, reviewed,		

and reinforced.		
I. Materials systematically differentiate between language proficiency levels for expressive and interpretive modes and are developmentally and linguistically appropriate for the designated language proficiency levels.		
J. Materials present an opportunity for language learners to engage in various cognitive functions (higher order thinking skills).		
K. Materials include language functions that support the progression of language development (e.g., compare, explain, describe, interpret, justify, etc.).		
L. Materials offer aligned assessment opportunities that genuinely measure student progress (benchmarks, formative, and summative).		
M. Content is relevant and links to prior knowledge, builds background knowledge, and promotes active student engagement.		
N. Materials provide opportunities for students to collect, organize, interpret, and evaluate information critically and creatively in a variety of formats (e.g., including the use of the student's first language).		
Comments for Part II Pedagogy:		

Part III – ACCESSIBILITY
Please provide evidence of the following:

A. Accuracy	*Yes*	*No*
1. Content is accurate and error-free, current, and grammatically correct (This includes text, maps, charts, timelines, demographics, statistics, photos, and illustrations).		
2. Treatment of social issues, religion, ethnicity, gender, and any groups with a handicap are presented in a balanced, objective, and academic manner, that is free from bias.		

B. Appropriateness	*Yes*	*No*
1. Materials provide access to grade-level rigor; systematically include scaffolding that builds student autonomy and supports students to progress from one proficiency level to the next; are linguistically and developmentally appropriate; and include extensions.		
2. Content is relevant, addresses a variety of cultural aspects, links to prior knowledge, builds background knowledge, and promotes active student engagement.		
3. Materials provide opportunities for students to collect, organize, interpret, and evaluate information critically and creatively in a variety of formats (e.g., including the use of the student's first language).		

	Yes	No
4. Text and layout are age/proficiency/grade-level appropriate, including font, color, spacing legibility, photos, graphics, and captioning.		

C. Scope	*Yes*	*No*
1. Materials present information in sufficient depth and breadth to adequately cover grade-band expectations in a logical manner.		
2. Material includes necessary guides such as a table of contents, glossary (e.g., English & Spanish), index, sidebars, atlas, dictionary/thesaurus, bibliography/footnotes, *see* and *see also* references, websites, literature links, and support agencies, etc.		
3. Content is presented in an academic, factual and objective manner, and addresses varied linguistic levels, abilities, and learning styles.		

D. Teacher Resources	*Yes*	*No*
1. Materials provide adequate teacher resources, which include suggestions for acceleration, extension of learning, integration, feedback, building of background knowledge, and/or review specific to ELs.		
2. Materials include a summary of contents, instruction and/or behavioral objectives, supplemental or linguistically and culturally relevant background information, and answer keys/rubrics.		
3. Materials are well organized, easy to use, comprehensive, durable and reasonably-sized, with sufficient material for student use.		
4. Resources accommodate the EL Support needs of beginning through veteran teachers as well as both content teachers and language teachers.		
5. Teacher's edition supports and provides help in using a variety of teaching strategies, techniques and technologies to meet individual student differences, including varied linguistic levels and abilities (e.g., guidance on how the teacher should intentionally model the use of grade-level appropriate English).		

E. Technology	*Yes*	*No*
1. Technology meets all criteria for accuracy, appropriateness, and scope. Format is easy to navigate, visually appealing and not distracting from content, and ideally includes a screen reader, bilingual word-to-word or phrase-to-phrase dictionary, and a Save/Record feature, if applicable. Print resources are available or may be converted to specialized formats for accessibility.		
2. Technology permits the integration of instructional delivery, learning activities, and assessment beyond word processing.		
3. Digital content can be accessed on various devices and Internet browsers. Digital resources are accessible.		
4. Technology features include accessibility options to enable all users equivalent access.		

5. The technology resource design contains engaging elements, appropriate visual and auditory elements, and provides an intuitive user interface.		
6. There are robust digital resources for student learning, practice, and assessment.		
7. Digital materials provide opportunities for meaningful, interactive experiences.		
8. Digital materials provide ELD content support for both content and language teachers to further develop expertise.		

Comments for Part III Accessibility:

Part IV: Overall Analysis *(For Textbook Commission Use Only)*

These instructional materials meet the criteria _____ **yes** _____ **no.**

Comments for Part IV: *Comments that further describe standards for yes or no responses in Parts I, II, or III.*

Instructional Materials Review Criteria Sheet - English Language Development (6-8)

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____COPYRIGHT DATE___

AUTHOR(S)_____ ISBN_____

ADVISOR_____ _____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate the appropriate grade:

Grade 6 ____   **Grade 7** ____   **Grade 8** ____

PART I CONTENT

Compatibility with the NC Standard Course of Study (NCSCoS) for English Language Development (ELD). *In accordance with State Board Policy TEXT-001, all items in Part I must be marked "yes" in order for the submission to be recommended.*

Answer yes to indicate the materials <u>meet the criteria</u> or no to indicate the materials <u>do not meet the criteria.</u>

Please explain your responses. Be sure to cite specific page numbers and textual references from the textbook as well as specific standards from the ELD NCSCoS.

	Yes	*No*
A. Materials present main concepts that support a minimum of **80%** of the grade-band Language Expectations (e.g., K, Grade 1, Grades 2-3, Grades 4-5) in the NCSCOS for English Language Development (ELD).		
B. Content, instructional tools, and assessment tools are consistent with the four Big Ideas and five ELD Standards Statements as well as the Language Expectations, and Proficiency Level Descriptors (PLD) of the *NC Standard Course of Study for English Language Development* for the appropriate grade-band (6-8).		
C. Content and materials represent a wide range of cultural and linguistic backgrounds, real-life connections (e.g., objects, models, representations, multimodal texts), and represent the integration of content and language by illustrating explicit and specific content-language connections.		
D. Materials provide for the use of technology, including for assistive purposes (e.g., dictionaries, glossaries, screen readers, etc.) and for supporting expression and communication.		
E. Materials include teacher resources, which provide information and opportunities for both content teachers and language teachers, to increase		

		Yes	*No*
	their own understanding of the concepts specific to English Language Development (ELD).		
Comments for Part I Content:			

PART II PEDAGOGY
Please provide evidence of the following:

	Yes	*No*
A. Materials provide for the integration of a multimodal and functional approach to language instruction including interpretative (listening, reading, and viewing) and expressive (speaking, writing, and representing) modes of communication.		
B. Materials include instructional activities and strategies that offer multiple means to opportunities for students to narrate, inform, explain, and argue.		
C. Materials promote the integration of content and language in linguistically and culturally sustaining ways, including connecting ELD standards to academic content standards and representing social and instructional language (e.g., narratives, informational texts, mathematical informational texts, informational texts in social studies).		
D. Materials represent an asset-based approach, leverage a wide range of cultural and linguistic backgrounds.		
E. Materials provide access to grade-level content, systematically include scaffolding that builds student autonomy and supports students to progress from one proficiency level to the next, and are linguistically and developmentally appropriate.		
F. Materials foster students' understanding and working knowledge of interpretive and expressive communication modes, including: ○ organization of language (how coherent texts are created) ○ cohesion of language (how ideas are connected across whole text) ○ density of language (how ideas are elaborated or condensed) ○ grammatical complexity (how meanings are extended or enhanced at the sentence dimension) ○ precision of language (how precise meanings are created through everyday, cross-disciplinary, and technical language at the word and phrase dimensions).		
G. Materials address academic language features at the discourse, sentence, and word and phrase dimensions in a consistent manner for all identified proficiency levels.		
H. Key concepts, skills, and vocabulary are identified, developed, reviewed, and reinforced.		
I. Materials systematically differentiate between language proficiency levels for expressive and interpretive modes and are developmentally and		

	Yes	No
linguistically appropriate for the designated language proficiency levels.		
J. Materials present an opportunity for language learners to engage in various cognitive functions (higher order thinking skills).		
K. Materials include language functions that support the progression of language development (e.g., compare, explain, describe, interpret, justify, etc.).		
L. Materials offer aligned assessment opportunities that genuinely measure student progress (benchmarks, formative, and summative).		
M. Content is relevant and links to prior knowledge, builds background knowledge, and promotes active student engagement.		
N. Materials provide opportunities for students to collect, organize, interpret, and evaluate information critically and creatively in a variety of formats (e.g., including the use of the student's first language).		
Comments for Part II Pedagogy:		

Part III – ACCESSIBILITY

Please provide evidence of the following:

A. Accuracy	*Yes*	*No*
1. Content is accurate and error-free, current, and grammatically correct (This includes text, maps, charts, timelines, demographics, statistics, photos, and illustrations).		
2. Treatment of social issues, religion, ethnicity, gender, and any groups with a handicap are presented in a balanced, objective, and academic manner, that is free from bias.		

B. Appropriateness	*Yes*	*No*
1. Materials provide access to grade-level rigor; systematically include scaffolding that builds student autonomy and supports students to progress from one proficiency level to the next; are linguistically and developmentally appropriate; and include extensions.		
2. Content is relevant, addresses a variety of cultural aspects, links to prior knowledge, builds background knowledge, and promotes active student engagement.		
3. Materials provide opportunities for students to collect, organize, interpret, and evaluate information critically and creatively in a variety of formats (e.g., including the use of the student's first language).		
4. Text and layout are age/proficiency/grade-level appropriate, including font, color, spacing legibility, photos, graphics, and captioning.		

C. Scope	Yes	No
1. Materials present information in sufficient depth and breadth to adequately cover grade-band expectations in a logical manner.		
2. Material includes necessary guides such as a table of contents, glossary (e.g., English & Spanish), index, sidebars, atlas, dictionary/thesaurus, bibliography/footnotes, *see* and *see also* references, websites, literature links, and support agencies, etc.		
3. Content is presented in an academic, factual and objective manner, and addresses varied linguistic levels, abilities, and learning styles.		

D. Teacher Resources	Yes	No
1. Materials provide adequate teacher resources, which include suggestions for acceleration, extension of learning, integration, feedback, building of background knowledge, and/or review specific to ELs.		
2. Materials include a summary of contents, instruction and/or behavioral objectives, supplemental or linguistically and culturally relevant background information, and answer keys/rubrics.		
3. Materials are well organized, easy to use, comprehensive, durable and reasonably-sized, with sufficient material for student use.		
4. Resources accommodate the EL Support needs of beginning through veteran teachers as well as both content teachers and language teachers.		
5. Teacher's edition supports and provides help in using a variety of teaching strategies, techniques and technologies to meet individual student differences, including varied linguistic levels and abilities (e.g., guidance on how the teacher should intentionally model the use of grade-level appropriate English).		

E. Technology	Yes	No
1. Technology meets all criteria for accuracy, appropriateness, and scope. Format is easy to navigate, visually appealing and not distracting from content, and ideally includes a screen reader, bilingual word-to-word or phrase-to-phrase dictionary, and a Save/Record feature, if applicable. Print resources are available or may be converted to specialized formats for accessibility.		
2. Technology permits the integration of instructional delivery, learning activities, and assessment beyond word processing.		
3. Digital content can be accessed on various devices and Internet browsers. Digital resources are accessible.		
4. Technology features include accessibility options to enable all users equivalent access.		
5. The technology resource design contains engaging elements, appropriate visual and auditory elements, and provides an intuitive user interface.		
6. There are robust digital resources for student learning, practice, and		

assessment.		
7. Digital materials provide opportunities for meaningful, interactive experiences.		
8. Digital materials provide ELD content support for both content and language teachers to further develop expertise.		

Comments for Part III Accessibility:

Part IV: Overall Analysis *(For Textbook Commission Use Only)*

These instructional materials meet the criteria _____ **yes** _____ **no.**

Comments for Part IV: *Comments that further describe standards for yes or no responses in Parts I, II, or III.*

Instructional Materials Review Criteria Sheet - English Language Development (9-12)

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____COPYRIGHT DATE____

AUTHOR(S)_____ ISBN_____

ADVISOR_____ _____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate the appropriate grade:

Grade 9 _____ **Grade 10** _____ **Grade 11** _____ **Grade 12** _____

PART I CONTENT

Compatibility with the NC Standard Course of Study (NCSCoS) for English Language Development (ELD). *In accordance with State Board Policy TEXT-001, all items in Part I must be marked "yes" in order for the submission to be recommended.*

Answer yes to indicate the materials <u>meet the criteria</u> or no to indicate the materials <u>do not meet the criteria</u>.
Please explain your responses. Be sure to cite specific page numbers and textual references from the textbook as well as specific standards from the ELD NCSCoS.

	Yes	*No*
A. Materials present main concepts that support a minimum of **80%** of the grade-band Language Expectations (e.g., K, Grade 1, Grades 2-3, Grades 4-5) in the NCSCOS for English Language Development (ELD).		
B. Content, instructional tools, and assessment tools are consistent with the four Big Ideas and five ELD Standards Statements as well as the Language Expectations, and Proficiency Level Descriptors (PLD) of the *NC Standard Course of Study for English Language Development* for the appropriate grade-band (9-12).		
C. Content and materials represent a wide range of cultural and linguistic backgrounds, real-life connections (e.g., objects, models, representations, multimodal texts), and represent the integration of content and language by illustrating explicit and specific content-language connections		
D. Materials provide for the use of technology, including for assistive purposes (e.g., dictionaries, glossaries, screen readers, etc.) and for supporting expression and communication.		
E. Materials include teacher resources, which provide information and opportunities for both content teachers and language teachers, to increase their own understanding of the concepts specific to English Language Development (ELD).		

Comments for Part I Content:

PART II PEDAGOGY
Please provide evidence of the following:

	Yes	*No*
A. Materials provide for the integration of a multimodal and functional approach to language instruction including interpretative (listening, reading, and viewing) and expressive (speaking, writing, and representing) modes of communication.		
B. Materials include instructional activities and strategies that offer multiple means to opportunities for students to narrate, inform, explain, and argue.		
C. Materials promote the integration of content and language in linguistically and culturally sustaining ways, including connecting ELD standards to academic content standards and representing social and instructional language (e.g., narratives, informational texts, mathematical informational texts, informational texts in social studies).		
D. Materials represent an asset-based approach, leverage a wide range of cultural and linguistic backgrounds.		
E. Materials provide access to grade-level content, systematically include scaffolding that builds student autonomy and supports students to progress from one proficiency level to the next, and are linguistically and developmentally appropriate.		
F. Materials foster students' understanding and working knowledge of interpretive and expressive communication modes, including: - organization of language (how coherent texts are created) - cohesion of language (how ideas are connected across whole text) - density of language (how ideas are elaborated or condensed) - grammatical complexity (how meanings are extended or enhanced at the sentence dimension) - precision of language (how precise meanings are created through everyday, cross-disciplinary, and technical language at the word and phrase dimensions).		
G. Materials address academic language features at the discourse, sentence, and word and phrase dimensions in a consistent manner for all identified proficiency levels.		
H. Key concepts, skills, and vocabulary are identified, developed, reviewed, and reinforced.		
I. Materials systematically differentiate between language proficiency levels for expressive and interpretive modes and are developmentally and linguistically appropriate for the designated language proficiency levels.		
J. Materials present an opportunity for language learners to engage in various cognitive functions (higher order thinking skills).		
K. Materials include language functions that support the progression of		

	Yes	No
language development (e.g., compare, explain, describe, interpret, justify, etc.).		
L. Materials offer aligned assessment opportunities that genuinely measure student progress (benchmarks, formative, and summative).		
M. Content is relevant and links to prior knowledge, builds background knowledge, and promotes active student engagement.		
N. Materials provide opportunities for students to collect, organize, interpret, and evaluate information critically and creatively in a variety of formats (e.g., including the use of the student's first language).		
Comments for Part II Pedagogy:		

Part III – ACCESSIBILITY
Please provide evidence of the following:

A. Accuracy	*Yes*	*No*
1. Content is accurate and error-free, current, and grammatically correct (This includes text, maps, charts, timelines, demographics, statistics, photos, and illustrations).		
2. Treatment of social issues, religion, ethnicity, gender, and any groups with a handicap are presented in a balanced, objective, and academic manner, that is free from bias.		

B. Appropriateness	*Yes*	*No*
1. Materials provide access to grade-level rigor; systematically include scaffolding that builds student autonomy and supports students to progress from one proficiency level to the next; are linguistically and developmentally appropriate; and include extensions.		
2. Content is relevant, addresses a variety of cultural aspects, links to prior knowledge, builds background knowledge, and promotes active student engagement.		
3. Materials provide opportunities for students to collect, organize, interpret, and evaluate information critically and creatively in a variety of formats (e.g., including the use of the student's first language).		
4. Text and layout are age/proficiency/grade-level appropriate, including font, color, spacing legibility, photos, graphics, and captioning.		

C. Scope	*Yes*	*No*
1. Materials present information in sufficient depth and breadth to adequately cover grade-band expectations in a logical manner.		
2. Material includes necessary guides such as a table of contents, glossary (e.g., English & Spanish), index, sidebars, atlas, dictionary/thesaurus, bibliography/footnotes, *see* and *see also* references, websites, literature		

links, and support agencies, etc.		
3. Content is presented in an academic, factual and objective manner, and addresses varied linguistic levels, abilities, and learning styles.		

D. Teacher Resources	Yes	No
1. Materials provide adequate teacher resources, which include suggestions for acceleration, extension of learning, integration, feedback, building of background knowledge, and/or review specific to ELs.		
2. Materials include a summary of contents, instruction and/or behavioral objectives, supplemental or linguistically and culturally relevant background information, and answer keys/rubrics.		
3. Materials are well organized, easy to use, comprehensive, durable and reasonably-sized, with sufficient material for student use.		
4. Resources accommodate the EL Support needs of beginning through veteran teachers as well as both content teachers and language teachers.		
5. Teacher's edition supports and provides help in using a variety of teaching strategies, techniques and technologies to meet individual student differences, including varied linguistic levels and abilities (e.g., guidance on how the teacher should intentionally model the use of grade-level appropriate English).		

E. Technology	Yes	No
1. Technology meets all criteria for accuracy, appropriateness, and scope. Format is easy to navigate, visually appealing and not distracting from content, and ideally includes a screen reader, bilingual word-to-word or phrase-to-phrase dictionary, and a Save/Record feature, if applicable. Print resources are available or may be converted to specialized formats for accessibility.		
2. Technology permits the integration of instructional delivery, learning activities, and assessment beyond word processing.		
3. Digital content can be accessed on various devices and Internet browsers. Digital resources are accessible.		
4. Technology features include accessibility options to enable all users equivalent access.		
5. The technology resource design contains engaging elements, appropriate visual and auditory elements, and provides an intuitive user interface.		
6. There are robust digital resources for student learning, practice, and assessment.		
7. Digital materials provide opportunities for meaningful, interactive experiences.		
8. Digital materials provide ELD content support for both content and language teachers to further develop expertise.		

Comments for Part III Accessibility:

Part IV: Overall Analysis *(For Textbook Commission Use Only)*

These instructional materials meet the criteria _____ **yes** _____ **no.**

Comments for Part IV: *Comments that further describe standards for yes or no responses in Parts I, II, or III.*

ENGLISH LANGUAGE DEVELOPMENT: EC EVALUATION

SUBJECT_____ GRADE _____

INSTRUCTIONAL MATERIALS TITLE _____BID NO._____

PUBLISHER_____ COPYRIGHT DATE _____

AUTHOR(S) _____ISBN_____

ADVISOR_____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Answer <u>yes</u> to indicate the textbook materials <u>meet the criteria</u> or <u>no</u> to indicate the textbook materials <u>do not meet the criteria</u>.

Appropriateness, Scope, and Resources	*Yes*	*No*
1. Content provides for grade appropriate, yet varied cognitive levels, abilities, and learning styles.		
2. Content is relevant, links to prior knowledge, builds background knowledge, and promotes active student engagement.		
3. Materials provide for a variety of exercises, reviews, assessments, and performance tasks, which provide opportunities for students to collect, organize, interpret, and evaluate information critically and creatively in a variety of formats.		
4. Text and layout are level appropriate, including font, color, spacing legibility, photos, graphics, and captioning.		
5. Materials and supplemental resources include necessary guides such as table of contents, glossary (English & Spanish), index, sidebars, atlas, dictionary/thesaurus, bibliography/footnotes, *see* and *see also* references, web sites, literature links, and support agencies etc.		
6. Content and materials promote language development opportunities for all grade levels: key concepts, skills, vocabulary are identified, developed, reviewed, and reinforced. Resources: Specific to language acquisition grades K-5 Specific to listening, speaking, reading, and writing grades K-2 Specific to listening, speaking, reading, and writing grades 3-5		
7. Materials provide adequate teacher resources, which include suggestions for remediation, acceleration, extension of learning, integration, feedback, and review.		
8. Materials include a summary of contents, instruction and/or behavioral objectives, supplemental or background information, and answer keys/rubrics.		
9. Materials are well organized, easy to use, comprehensive, durable and reasonably sized, with sufficient material for student use.		
10. Resources accommodate the needs of all teachers from beginning through veteran teachers.		
11. Technology meets criteria for accuracy, appropriateness, and scope. It is easy to navigate, visually appealing, and includes a Save/Record feature; if applicable.		
12. Content and materials clearly align with the Science of Reading for all grade levels (K-12). Resources: Reading specific to grades K-3 Reading specific to grades K-5 Reading specific to grades 4-12 Reading Research to Classroom Practice RRtCP Guidelines		

Keeping in mind the needs of EC students and their teachers, please give specifics to support both the yes and no responses to the above.

Comments for yes and no responses above:

Social Studies Education
Standards Overview

Today's society is changing at an increasingly rapid rate due to globalization stimulated by technology and innovation. As a result, education must ensure that students can meet the demands beyond school. To answer this call for change, the North Carolina State Board of Education revised its vision to support the notion that every public school student will be empowered to accept academic challenges, prepared to pursue their chosen path after graduating high school, and encouraged to become lifelong learners with the capacity to engage in a globally-collaborative society. It is within this context that the North Carolina Standard Course of Study for K-12 Social Studies was developed.

There are two primary purposes of social studies. The first is to develop young people who are knowledgeable, critical, and capable of making informed decisions about the world and their place in it. The second purpose is to prepare young people to participate actively and responsibly in a culturally diverse, democratic, and increasingly interdependent world. It is the intent of the K-12 Social Studies section that this set of standards serve as a conceptual framework that prepares students to not only graduate from high school ready for a post-secondary education or career, but to prepare them to be civic ready.

Civic literacy requires that students:
- Process information at higher cognitive levels
- Use disciplinary skills and tools in the ways that social scientists would
- Use content and concepts to think deeply about, reflect on and/or act on local, state, national, and global issues
- Understand enduring and transferable ideas of the social studies disciplines
- Develop the civic dispositions required to be contributing members of society
- Pose and answer questions that matter to them and society
- Use multiple sources of information as evidence to support questions posed during an inquiry
- Collaborate and interact on a personal level with people from diverse contexts

North Carolina students can achieve civic readiness through an instructional program aligned to the Social Studies Standards and Objectives as presented in the North Carolina Standard Course of Study adopted on February 4, 2021.

The adoption of the Social Studies Standards as the North Carolina Standard Course of Study provides the foundation from which a well-planned social studies curriculum may be developed at the Public School Unit (PSU) level.

The Social Studies program includes standards and objectives that are conceptually written and organized around the five strands of History, Geography and Environmental Literacy, Civics and Government, Economics and Financial Literacy, as well as Behavioral Science. The inquiry strand is a new addition. It is not a discipline of social studies. It is a domain that incorporates the skills of social studies with the opportunity to think critically, evaluate sources, use evidence, solve problems, communicate, and act. These same six strands are present in all Social Studies grades/courses, K-12 (except the Economics and Personal Finance course which has its own strands appropriate for that course).

Instructional materials submitted for textbook adoption should align with these standards. Additional consideration should be given to the aforementioned elements which form the foundation for the K-12 Social Studies Standards. All of these things, taken together, represent the criteria used to assess instructional materials submitted for textbook adoption.

More information about the North Carolina Social Studies Standards may be found on the NCDPI website:
https://www.dpi.nc.gov/teach-nc/curriculum-instruction/standard-course-study/social-studies

Instructional Materials Review Criteria Sheet – Social Studies Grades K-5

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____ COPYRIGHT DATE_____

AUTHOR(S)_____ISBN_____

ADVISOR_____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate appropriate course:
( ) Kindergarten   ( ) First Grade   ( ) Second Grade   ( ) Third Grade   ( ) Fourth Grade
( ) Fifth Grade

PART I. Content.

Note: All instructional materials (both digital and print) shall be compatible with the philosophy, standards and objectives in the North Carolina Standard Course of Study, adopted February 2021.

Part IA Check *yes* *to indicate the instructional materials* *meet the criteria* *or check* *no* *to indicate the instructional materials* *do not meet the criteria.* **Materials must meet the criteria for both Items A and B.** *If either item is marked "no" in Part IA, do not complete Parts IB II, III, and IV.*

	Yes	*No*
1. Materials present the main concepts, facts/topics, and skills that support a minimum of 80% of the objectives in the *North Carolina Social Studies Standards* for the appropriate course/grade level.		
2. Content (facts/topics/concepts/skills), instructional tools (methodology/strategies/tasks), and assessment tools (methodology/strategies/tasks) are consistent with the philosophy, standards and goals of the *NC Standard Course of Study for Social Studies* for the appropriate course/grade level.		
Comments for Part IA:		

Part IB Check **yes** **to indicate the instructional materials** **meet the criteria** **or check** **no** **to indicate the instructional materials** **do not meet the criteria.** **If two or more items are marked "no" in Part IB, do not complete Parts II, III, and IV.**

	Yes	*No*
1. Materials reflect unbiased, non-stereotypical, accurate, comprehensive and current social studies research-based information and practices: authors, consultants, and reviewers include professionals with a wide range of experiences and expertise, including persons with secondary classroom experience.		
2. Materials provide a sufficient number of hands-on inquiries, experiences, and authentic tasks in a		

	Yes	No
variety of contexts (e.g., in-school, out of school, group tasks, independent tasks, discussion, reading) that integrate and support the key concepts, factual content, and disciplinary and critical thinking skills of social studies at a developmentally appropriate level.		
3. Material provides access to or demonstrates concepts and factual content in multiple ways, including in writing, verbally, graphically, as well as through the use of maps, charts, illustrations, and political cartoons.		
4. Diverse groups and balanced viewpoints of events are comprehensively integrated and avoid stereotypic depictions in terms of race, gender or ability.		
5. Materials are relevant to the diversity of students' lives, interests, abilities, and learning styles and promotes interactive and participatory learning.		
Comments for Part IB:		

Part II Pedagogy

A. Specific Criteria	Yes	No
1. Materials ask students to communicate social studies concepts and ideas visually (e.g., maps, charts, graphs), orally and in writing and by explaining, clarifying, and defending their ideas while engaged in discourse with peers and teachers.		
2. Materials require students to gather, organize, interpret, analyze, explain and evaluate information from a variety of sources, primary and secondary (i.e., articles, journals, online resources, maps, charts, graphs, illustrations, political cartoons, articles and other artifacts).		
3. Materials allow for students to develop skills used by behavioral scientists,, economists, geographers, historians, and political scientists to discern information about events and issues over time.		
4. Materials examine issues and events from multiple perspectives (e.g., geographic, cultural, socioeconomic, ethnic, racial, historical, contemporary, local, state, and national).		
5. Materials provide opportunities for the discussion of global, regional, and local issues.		
6. Issues and historical events are presented and treated factually and objectively.		
7. Materials are thematically and chronologically organized to promote conceptual understanding of events and issues as appropriate.		
8. Materials integrate cultural, economic, geographic, historical, and political aspects of the local community, state, nation, and world throughout to enhance student understanding and relevance.		
9. Materials integrate student assessment in the instructional design.		
10. Materials include assessment tasks or items that measure mastery of concepts, factual content and skills in a variety of formats.		
11. Materials include specific questions or tasks to assist the teacher and student in identifying the concepts, factual content, and skills students have mastered before they begin new material.		
12. Materials include assessment tasks or items that can be used as diagnostic or formative instruments that help determine learners' needs, rather than merely as instruments for grading students at the end of a unit or chapter.		

B. Teacher Resources	Yes	No
1. Teacher resources include a summary of material contents.		
2. Teacher resources provide instructional and/or behavioral objectives.		
3. Teacher resources are well organized, easy to use, and comprehensive		

	Yes	No
4. Teacher resources provide for the development, reinforcement, and review of factual content, skills, and concepts.		
5. Teacher resources support and provide help in the use of a variety of strategies, techniques, and technologies for differentiated instruction.		
6. Teacher resources provide suggestions for evaluation, remediation, acceleration, and feedback.		
7. Teacher resources include suggestions for the extension of learning and integration across the curriculum.		
8. Teacher resources provide ancillary materials for student use.		
9. Teacher resources provide supplementary or background information.		
10. Teacher resources include answer key(s).		

Comments for Part II:

Part III Accessibility *(If applicable)*

(Note: Digital considerations may refer to software as well as online resources. The criteria presented here are in addition to the criteria listed in previous sections.)

	Yes	*No*
A. Information retrieval is easy and rapid.		
B. Intuitive icons, menus, and directional symbols are provided that foster independent use.		
C. Graphic design is attractive, colorful, and uncluttered.		
D. Graphic design is not stereotypic or biased and does not contain inaccurate portrayals		
E. All visuals and interactive elements are clearly and accurately labeled.		
F. Appropriate and supportive feedback is provided if applicable.		
G. Options for help and tutorial segments are provided.		
H. Ability to download and save or access content offline.		
I. Save options for games or activities in progress are available when appropriate.		
J. Note-taking feature is available when appropriate.		
K. A record-keeping feature to monitor student progress is available when appropriate.		
L. Teacher has full access to individual student monitoring of activities, assignments, and assessments.		
M. Descriptions of specific hardware requirements for operating the application are provided.		
N. Technical assistance is available and instructions for access are easily understood		
O. Can integrate with various Learning Management Systems (LMS) (Canvas, Google Classroom, etc.)		
P. Functions flawlessly on a variety of platforms at school and home.		
Comments for Part III:		

Part IV Overall Analysis *(For Textbook Commission Use Only)*
These instructional materials meet the criteria _____ **yes**   _____ **no**.

Comments for Part IV: *Additional comments for yes or no responses in Parts I, II, III, or IV.*

Instructional Materials Review Criteria Sheet – Social Studies Grades 6-7

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____ COPYRIGHT DATE_____

AUTHOR(S)_____ISBN_____

ADVISOR_____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate appropriate course:
World Studies I: Development of Civilizations (6th Grade) _____
World Studies II: Modern Era (7th Grade) _____

PART I Content

Note: All instructional materials (both digital and print) shall be compatible with the philosophy, standards and objectives in the North Carolina Standard Course of Study, adopted February 2021.

Part IA Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. **Materials must meet the criteria for both Items A and B.** *If either item is marked "no" in Part IA, do not complete Parts IB II, III, and IV.*

	Yes	*No*
1. Materials present the main concepts, facts/topics, and skills that support a minimum of 80% of the objectives in the *North Carolina Social Studies Standards* for the appropriate course/grade level.		
2. Content (facts/topics/concepts/skills), instructional tools (methodology/strategies/tasks), and assessment tools (methodology/strategies/tasks) are consistent with the philosophy, standards and goals of the *NC Standard Course of Study for Social Studies* for the appropriate course/grade level.		
Comments for Part 1A:		

Part IB Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. If two or more items are marked "no" in Part IB, do not complete Parts II, III, and IV.

	Yes	*No*
1. Materials reflect unbiased, non-stereotypical, accurate, comprehensive and current social studies research-based information and practices: authors, consultants, and reviewers include professionals with a wide range of experiences and expertise, including persons with secondary classroom experience.		
2. Materials provide a sufficient number of hands-on inquiries, experiences, and authentic tasks in a variety of contexts (e.g., in-school, out of school, group tasks, independent tasks, discussion, reading) that integrate and support the key concepts, factual content, and disciplinary and critical thinking skills of social studies at a developmentally appropriate level.		
3. Material provides access to or demonstrates concepts and factual content in multiple ways, including in writing, verbally, graphically, as well as through the use of maps, charts, illustrations, and political cartoons.		
4. Diverse groups and balanced viewpoints of events are comprehensively integrated and avoid		

		Yes	No
	stereotypic depictions in terms of race, gender or ability.		
5.	Materials are relevant to the diversity of students' lives, interests, abilities, and learning styles and promotes interactive and participatory learning.		

Comments for Part IB:

Part II Pedagogy

A. Specific Criteria	Yes	No
1. Materials ask students to communicate social studies concepts and ideas visually (e.g., maps, charts, graphs), orally and in writing and by explaining, clarifying, and defending their ideas while engaged in discourse with peers and teachers.		
2. Materials require students to gather, organize, interpret, analyze, explain and evaluate information from a variety of sources, primary and secondary (i.e., articles, journals, online resources, maps, charts, graphs, illustrations, political cartoons, articles and other artifacts).		
3. Materials allow for students to develop skills used by anthropologists, economists, geographers, historians, and political scientists to discern information about events and issues over time.		
4. Materials allow students to study various civilizations, societies, nations, cultures, etc. that provide a balance between western and non-western world content with a strong emphasis on the connectivity of the two.		
5. Materials examine issues and events from multiple perspectives (e.g., geographic, cultural, socioeconomic, ethnic, racial, historical, contemporary, local, state, and national).		
6. Materials provide opportunities for the discussion of global, regional, and local issues that continue to foster debate and promote divergent points of view.		
7. Issues and historical events are presented and treated factually and objectively with all major viewpoints represented.		
8. Materials are thematically and chronologically organized to promote conceptual understanding of events and issues.		
9. Materials integrate cultural, economic, geographic, historical, and political aspects of the world throughout to enhance student understanding and relevance.		
10. Materials integrate student assessment in the instructional design.		
11. Materials include assessment tasks or items that measure mastery of concepts, factual content and skills in a variety of formats.		
12. Materials include specific questions or tasks to assist the teacher and student in identifying the concepts, factual content, and skills students have mastered before they begin new material.		
13. Materials include assessment tasks or items that can be used as diagnostic or formative instruments that help determine learners' needs, rather than merely as instruments for grading students at the end of a unit or chapter.		

B. Resources	Yes	No
1. Teacher resources include a summary of material contents.		
2. Teacher resources provide instructional and/or behavioral objectives.		
3. Teacher resources are well organized, easy to use, and comprehensive.		
4. Teacher resources provide for the development, reinforcement, and review of factual content, skills, and concepts.		
5. Teacher resources support and provide help in the use of a variety of strategies, techniques, and technologies for differentiated instruction.		
6. Teacher resources provide suggestions for evaluation, remediation, acceleration, and feedback.		

	Yes	No
7. Teacher resources include suggestions for the extension of learning and integration across the curriculum.		
8. Teacher resources provide ancillary materials for student use.		
9. Teacher resources provide supplementary or background information.		
10. Teacher resources include answer key(s)		

Comments for Part II:

Part III Accessibility *(if applicable)*

(Note: Digital considerations may refer to software as well as online resources. The criteria presented here are in addition to the criteria listed in previous sections.)

	Yes	*No*
A. Information retrieval is easy and rapid.		
B. Intuitive icons, menus, and directional symbols are provided that foster independent use.		
C. Graphic design is attractive, colorful, and uncluttered.		
D. Graphic design is not stereotypic or biased and does not contain inaccurate portrayals		
E. All visuals and interactive elements are clearly and accurately labeled.		
F. Appropriate and supportive feedback is provided if applicable.		
G. Options for help and tutorial segments are provided.		
H. Ability to download and save or access content offline.		
I. Save options for games or activities in progress are available when appropriate.		
J. Note-taking feature is available when appropriate.		
K. . A record-keeping feature to monitor student progress is available when appropriate.		
L. Teacher has full access to individual student monitoring of activities, assignments, and assessments.		
M. Descriptions of specific hardware requirements for operating the application are provided.		
N. Technical assistance is available and instructions for access are easily understood		
O. Can integrate with various Learning Management Systems (LMS) (Canvas, Google Classroom, etc.)		
P. Functions flawlessly on a variety of platforms at school and home.		

Comments for Part III:

Part IV Overall Analysis (*For Textbook Commission Use Only*)
These instructional materials meet the criteria _____ **yes**   _____ **no**.

Comments for Part IV: *Additional comments for yes or no responses in Parts I, II, III or IV.*

Instructional Materials Review Criteria Sheet – Social Studies Grade 8

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____ COPYRIGHT DATE_____

AUTHOR(S)_____ISBN_____

ADVISOR_____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate Appropriate Course:
North Carolina and American History _____

PART I Content

(Note: All instructional materials (both digital and print) shall be compatible with the philosophy, standards and objectives in the North Carolina Standard Course of Study, adopted February 2021.

Part IA Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. Materials must meet the criteria for both Items A and B. If either item is marked "no" in Part IA, do not complete Parts IB, II, III, and IV.

	Yes	*No*
1. Materials present the main concepts, facts, and skills that support a minimum of 80% of the objectives for the *North Carolina* Social Studies Standards for the appropriate course/grade level.		
2. Content (facts/topics/concepts/skills), instructional tools (methodology/strategies/tasks), and assessment tools (methodology/strategies/tasks) are consistent with the philosophy, standards and goals of the *NC Standard Course of Study for Social Studies* for the appropriate course/grade level.		
Comments for Part IA:		

Part IB Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. If two or more items are marked "no" in Part IB, do not complete Parts II, III, and IV.

	Yes	*No*
1. Materials reflect unbiased, non-stereotypical, accurate, comprehensive and current social studies research-based information and practices: authors, consultants, and reviewers include professionals with a wide range of experiences and expertise, including persons with secondary classroom experience.		
2. Materials provide a sufficient number of hands-on inquiries, experiences, and authentic tasks in a variety of contexts (e.g., in-school, out of school, group tasks, independent tasks, discussion, reading) that integrate and support the key concepts, factual content, and disciplinary and critical thinking skills of social studies at a developmentally appropriate level.		
3. Material provides access to or demonstrates concepts and factual content in multiple ways, including in writing, verbally, graphically, as well as through the use of maps, charts, illustrations, and political cartoons.		
4. Diverse groups and balanced viewpoints of events are comprehensively integrated and avoid		

	Yes	No
stereotypic depictions in terms of race, gender or ability.		
5. Materials are relevant to the diversity of students' lives, interests, abilities, and learning styles and promotes interactive and participatory learning.		
6. Religious references shall be uncensored and included in American history textbooks.		

Comments for Part IB:

Part II Pedagogy

A. Specific Criteria	Yes	No
1. Materials ask students to communicate social studies concepts and ideas visually (e.g., maps, charts, graphs), orally and in writing and by explaining, clarifying, and defending their ideas while engaged in discourse with peers and teachers.		
2. Materials require students to gather, organize, interpret, analyze, explain and evaluate information from a variety of sources, primary and secondary (i.e., articles, journals, online resources, maps, charts, graphs, illustrations, political cartoons, articles and other artifacts).		
3. Materials allow for students to develop skills used by anthropologists, economists, geographers, historians, and political scientists to discern information about events and issues over time.		
4. Materials allow students to study various geographic regions and cultural groups both in North Carolina and across the United States.		
5. Materials examine issues and events from multiple perspectives (e.g., geographic, cultural, socioeconomic, ethnic, racial, historical, contemporary, local, state, and national).		
6. Materials provide opportunities for the discussion of global, national, regional, and local issues that continue to foster debate and promote divergent points of view.		
7. Issues and historical events are presented and treated factually and objectively with all major viewpoints represented.		
9. Materials are thematically and chronologically organized to promote conceptual understanding of events and issues.		
10. Materials integrate cultural, economic, geographic, historical, and political aspects of North Carolina and the United States (and the globe as appropriate) throughout to enhance student understanding and relevance.		
11. Materials integrate student assessment in the instructional design.		
12. Materials include assessment tasks or items that measure mastery of concepts, factual content and skills in a variety of formats.		
13. Materials include specific questions or tasks to assist the teacher and student in identifying the concepts, factual content, and skills students have mastered before they begin new material.		
14. Materials include assessment tasks or items that can be used as diagnostic or formative instruments that help determine learners' needs, rather than merely as instruments for grading students at the end of a unit or chapter.		
15. Materials ask students to communicate social studies concepts and ideas visually (e.g., maps, charts, graphs), orally and in writing and by explaining, clarifying, and defending their ideas while engaged in discourse with peers and teachers.		

B. Resources	Yes	No
1. Teacher resources include a summary of material contents.		
2. Teacher resources provide instructional and/or behavioral objectives.		
3. Teacher resources are well organized, easy to use, and comprehensive.		
4. Teacher resources provide for the development, reinforcement, and review of factual content, skills, and concepts.		
5. Teacher resources support and provide help in the use of a variety of strategies, techniques, and		

	Yes	No
technologies for differentiated instruction.		
6. Teacher resources provide suggestions for evaluation, remediation, acceleration, and feedback.		
7. Teacher resources include suggestions for the extension of learning and integration across the curriculum.		
8. Teacher resources provide ancillary materials for student use.		
9. Teacher resources provide supplementary or background information.		
10. Teacher resources include answer key(s)		

Comments for Part II:

Part III Accessibility

(Note: Digital considerations may refer to software as well as online resources. The criteria presented here are in addition to the criteria listed in previous sections.)

	Yes	*No*
A. Information retrieval is easy and rapid.		
B. Intuitive icons, menus, and directional symbols are provided that foster independent use.		
C. Graphic design is attractive, colorful, and uncluttered.		
D. Graphic design is not stereotypic or biased and does not contain inaccurate portrayals		
E. All visuals and interactive elements are clearly and accurately labeled.		
F. Appropriate and supportive feedback is provided if applicable.		
G. Options for help and tutorial segments are provided.		
H. Ability to download and save or access content offline.		
I. Save options for games or activities in progress are available when appropriate.		
J. Note-taking feature is available when appropriate.		
K. A record-keeping feature to monitor student progress is available when appropriate.		
L. Teacher has full access to individual student monitoring of activities, assignments, and assessments.		
M. Descriptions of specific hardware requirements for operating the application are provided.		
N. Technical assistance is available and instructions for access are easily understood		
O. Can integrate with various Learning Management Systems (LMS) (Canvas, Google Classroom, etc.)		
P. Functions flawlessly on a variety of platforms at school and home.		

Comments for Part III:

Part IV Overall Analysis *(For Textbook Commission Use Only)*
These instructional materials meet the criteria _____ **yes** _____ **no**.

Comments for Part IV: *Additional comments for yes or no responses in Parts I, II, III, or IV.*

Instructional Materials Review Criteria Sheet – Social Studies Grades 9-12

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____ COPYRIGHT DATE_____

AUTHOR(S)_____ISBN_____

ADVISOR_____ _____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate Appropriate Course:

American History _____

PART I Content

(Note: All instructional materials (both digital and print) shall be compatible with the philosophy, standards and objectives in the North Carolina Standard Course of Study, adopted February 2021.

Part IA Check <u>yes</u> to indicate the instructional materials <u>meet the criteria</u> or check <u>no</u> to indicate the instructional materials <u>do not meet the criteria</u>. **Materials must meet the criteria for both Items A and B.** *If either item is marked "no" in Part IA, do not complete Parts IB, II, III, and IV.*

	Yes	*No*
1. Materials present the main concepts, facts/topics, and skills that support a minimum of 80% of the objectives in the *North Carolina Social Studies Standards* for the appropriate course/grade level. .		
2. Content (facts/topics/concepts/skills), instructional tools (methodology/strategies/tasks), and assessment tools (methodology/strategies/tasks) are consistent with the philosophy, standards and goals of the *NC Standard Course of Study for Social Studies* for the appropriate course/grade level.		
Comments for Part IA: *(Use extra sheets if necessary)*		

Part IB Check <u>yes</u> to indicate the instructional materials <u>meet the criteria</u> or check <u>no</u> to indicate the instructional materials <u>do not meet the criteria</u>. If two or more items are marked "no" in Part IB, do not complete Parts II, III, and IV.

	Yes	*No*
1. Materials reflect unbiased, non-stereotypical, accurate, comprehensive and current social studies research-based information and practices: authors, consultants, and reviewers include professionals with a wide range of experiences and expertise, including persons with secondary classroom experience.		
2. Materials provide a sufficient number of hands-on inquiries, experiences, and authentic tasks in a variety of contexts (e.g., in-school, out of school, group tasks, independent tasks, discussion, reading) that integrate and support the key concepts, factual content, and disciplinary and critical thinking skills of social studies at a developmentally appropriate level.		
3. Material provides access to or demonstrates concepts and factual content in multiple ways, including in writing, verbally, graphically, as well as through the use of maps, charts, illustrations,		

		Yes	No
	and political cartoons.		
4.	Diverse groups and balanced viewpoints of events are comprehensively integrated and avoid stereotypic depictions in terms of race, gender or ability.		
5.	Materials are relevant to the diversity of students' lives, interests, abilities, and learning styles and promotes interactive and participatory learning.		
6.	Religious references shall be uncensored and included in American history textbooks.		

Comments for Part IB:

Part II Pedagogy

A. Specific Criteria	Yes	No
1. Materials ask students to communicate social studies concepts and ideas visually (e.g., maps, charts, graphs), orally and in writing and by explaining, clarifying, and defending their ideas while engaged in discourse with peers and teachers.		
2. Materials require students to gather, organize, interpret, analyze, explain and evaluate information from a variety of sources, primary and secondary (i.e., articles, journals, online resources, maps, charts, graphs, illustrations, political cartoons, articles and other artifacts).		
3. Issues, key turning points, and presidential administrations are presented and treated factually and objectively with all major viewpoints represented.		
4. Materials integrate cultural, economic, geographic, political and social aspects throughout the text to enhance student understanding and relevance.		
5. Content is organized both thematically and chronologically in order to promote deeper understanding of history and issues.		
6. Materials provide the opportunities for the discussion of contemporary and global issues.		
7. Materials include content that adequately covers the founding principles of the United States and the State of North Carolina.		
8. Materials integrate student assessment in the instructional design.		
9. Materials include assessment tasks or items that measure mastery of concepts, factual content and skills in a variety of formats.		
10. Materials include specific questions or tasks to assist the teacher and student in identifying the concepts, factual content, and skills students have mastered before they begin new material.		
11. Materials include assessment tasks or items that can be used as diagnostic or formative instruments that help determine learners' needs, rather than merely as instruments for grading students at the end of a unit or chapter.		

B. Teacher Resources	Yes	No
1. Teacher resources include a summary of material contents.		
2. Teacher resources provide instructional and/or behavioral objectives.		
3. Teacher resources are well organized, easy to use, and comprehensive		
Teacher resources provide for the development, reinforcement, and review of factual content, skills, and concepts.		
4. Teacher resources support and provide help in the use of a variety of strategies, techniques, and technologies for differentiated instruction.		
5. Teacher resources provide suggestions for evaluation, remediation, acceleration, and feedback.		
6. Teacher resources include suggestions for the extension of learning and integration across the curriculum.		
7. Teacher resources provide ancillary materials for student use.		
8. Teacher resources provide supplementary or background information.		
9. Teacher resources include answer key(s)		

Comments for Part II:

Part III Accessibility (*if applicable)*

(Note: Digital considerations may refer to software as well as online resources. The criteria presented here are in addition to the criteria listed in previous sections.)

	Yes	*No*
A. Information retrieval is easy and rapid.		
B. Intuitive icons, menus, and directional symbols are provided that foster independent use.		
C. Graphic design is attractive, colorful, and uncluttered.		
D. Graphic design is not stereotypic or biased and does not contain inaccurate portrayals		
E. All visuals and interactive elements are clearly and accurately labeled.		
F. Appropriate and supportive feedback is provided if applicable.		
G. Options for help and tutorial segments are provided.		
H. Ability to download and save or access content offline.		
I. Save options for games or activities in progress are available when appropriate.		
J. Note-taking feature is available when appropriate.		
K. A record-keeping feature to monitor student progress is available when appropriate.		
L. Teacher has full access to individual student monitoring of activities, assignments, and assessments.		
M. Descriptions of specific hardware requirements for operating the application are provided.		
N. Technical assistance is available and instructions for access are easily understood		
O. Can integrate with various Learning Management Systems (LMS) (Canvas, Google Classroom, etc.)		
P. Functions flawlessly on a variety of platforms at school and home.		
Comments for Part III:		

Part IV Overall Analysis (*For Textbook Commission Use Only)*
These instructional materials meet the criteria _____ **yes**   _____ **no**.

Comments for Part IV: *Additional comments for yes or no responses in Parts I, II, III, or IV.*

Instructional Materials Review Criteria Sheet – Social Studies Grades 9-12

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____ COPYRIGHT DATE_____

AUTHOR(S)_____ISBN_____

ADVISOR_____ _____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate Appropriate Course:
Founding Principles of the United States of America and North Carolina: Civic Literacy _____

PART I Content

Note All instructional materials (both digital and print) shall be compatible with the philosophy, standards and objectives in the North Carolina Standard Course of Study, revised (February 4, 2021).

Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. **Materials must meet the criteria for both Items A and B.** *If either item is marked "no" in Part IA, do not complete Parts IB II, III, and IV.*

	Yes	*No*
1. Materials present the main concepts, facts/topics, and skills that support a minimum of 80% of the objectives in the North Carolina. *Social Studies Standards* for the appropriate course/grade level..		
2. Content (facts/topics/concepts/skills), instructional tools (methodology/strategies/tasks), and assessment tools (methodology/strategies/tasks) are consistent with the philosophy, standards and goals of the *Standard Course of Study for Social Studies for the appropriate course/grade level*.		
Comments for Part IA:		

Part IB Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. If two or more items are marked "no" in Part IB, do not complete Parts II, III, and IV.

	Yes	*No*
1. Materials reflect unbiased, non-stereotypical, accurate, comprehensive and current social studies research-based information and practices: authors, consultants, and reviewers include professionals with a wide range of experiences and expertise, including persons with secondary classroom experience.		
2. Materials provide a sufficient number of hands-on inquiries, experiences, and authentic tasks in a variety of contexts (e.g., in-school, out of school, group tasks, independent tasks, discussion, reading) that integrate and support the key concepts, factual content, and disciplinary and critical thinking skills of social studies at a developmentally appropriate level.		
3. Material provides access to or demonstrates concepts and factual content in multiple ways, including in writing, verbally, graphically, as well as through the use of maps, charts, illustrations, and political cartoons.		
4. Diverse groups and balanced viewpoints of events are comprehensively integrated and avoid		

stereotypic depictions in terms of race, gender or ability.		
5. Materials are relevant to the diversity of students' lives, interests, abilities, and learning styles and promotes interactive and participatory learning.		
6. Religious references shall be uncensored and included in American history textbooks.		

Comments for Part IB:

Part II Pedagogy

A. Specific Criteria	*Yes*	*No*
Materials ask students to communicate social studies concepts and ideas visually (e.g., maps, charts, graphs), orally and in writing and by explaining, clarifying, and defending their ideas while engaged in discourse with peers and teachers.		
1. Materials require students to gather, organize, interpret, analyze, explain and evaluate information from a variety of sources, primary and secondary (i.e., articles, journals, online resources, maps, charts, graphs, illustrations, political cartoons, articles and other artifacts).		
2. Issues are presented and treated factually and objectively with all major viewpoints represented.		
3. Materials integrate cultural, economic, geographic, historical, and political aspects of U.S. society (and the global society as appropriate) throughout the text to enhance student understanding and relevance.		
4. Materials emphasize the student's place in the community, country, and the world in the 21st century.		
6. Materials provide the opportunities for the discussion of contemporary and global issues.		
7. Materials integrate student assessment in the instructional design.		
8. Materials include assessment tasks or items that measure mastery of concepts, factual content and skills in a variety of formats		
9. Materials include specific questions or tasks to assist the teacher and student in identifying the concepts, factual content, and skills students have mastered before they begin new material.		
10. Materials include content that allows students to adequately understand the founding principles of the United States, including those enumerated by the NC General Assembly in Session Law 2019-82 which are: • The Creator-endowed inalienable rights of the people • Structure of government, separation of powers with checks and balances • Frequent and free elections in a representative government • Rule of law • Equal justice under the law • Private property rights • Federalism • Due process • Individual rights as set forth in the Bill of Rights • Individual responsibility • Constitutional limitations on government power to tax and spend, and prompt payment of public debt • Strong defense and supremacy of civil authority over military • Peace, commerce, and honest friendship with all nations, entangling alliances with none		

B.	*Yes*	*No*
1. Teacher resources include a summary of material contents.		
2. . Teacher resources provide instructional and/or behavioral objectives.		

	Yes	No
3. Teacher resources are well organized, easy to use, and comprehensive		
4. Teacher resources provide for the development, reinforcement, and review of factual content , skills, and concepts.		
5. Teacher resources support and provide help in the use of a variety of strategies, techniques, and technologies for differentiated instruction.		
6. Teacher resources provide suggestions for evaluation, remediation, acceleration, and feedback.		
7. Teacher resources include suggestions for the extension of learning and integration across the curriculum.		
8. Teacher resources provide ancillary materials for student use.		
9. Teacher resources provide supplementary or background information.		
10. Teacher resources include answer key(s)		
Comments for Part II		

Part III Accessibility(if applicable.)

(Note: Digital considerations may refer to software as well as online resources. The criteria presented here are in addition to the criteria listed in previous sections.)

	Yes	*No*
A. Information retrieval is easy and rapid.		
B. Intuitive icons, menus, and directional symbols are provided that foster independent use.		
C. Graphic design is attractive, colorful, and uncluttered.		
D. Graphic design is not stereotypic or biased and does not contain inaccurate portrayals		
E. All visuals and interactive elements are clearly and accurately labeled.		
F. Appropriate and supportive feedback is provided if applicable.		
G. Options for help and tutorial segments are provided.		
H. Ability to download and save or access content offline.		
I. Save options for games or activities in progress are available when appropriate.		
J. Note-taking feature is available when appropriate.		
K. A record-keeping feature to monitor student progress is available when appropriate.		
L. Teacher has full access to individual student monitoring of activities, assignments, and assessments.		
M. Descriptions of specific hardware requirements for operating the application are provided.		
N. Technical assistance is available and instructions for access are easily understood		
O. Can integrate with various Learning Management Systems (LMS) (Canvas, Google Classroom, etc.)		
P. Functions flawlessly on a variety of platforms at school and home.		
Comments for Part III:		

Part IV Overall Analysis: (For Textbook Commission Use Only)
These instructional materials meet the criteria _____ **yes**   _____ **no**.

Comments for Part IV: *Additional comments for yes or no responses in Parts I, II, III, or IV.*

Instructional Materials Review Criteria Sheet – Social Studies Grades 9-12

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____ COPYRIGHT DATE_____

AUTHOR(S)_____ISBN_____

ADVISOR_____ _____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate Appropriate Course:

World History _____

PART I Content

Note: All instructional materials (both digital and print) shall be compatible with the philosophy, standards and objectives in the North Carolina Standard Course of Study, adopted February 2021.

Part IA *Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. Materials must meet the criteria for both Items A and B. If either item is marked "no" in Part IA, do not complete Parts IB, II, III, and IV.*

	Yes	*No*
1. Materials present the main concepts, facts/topics, and skills that support a minimum of 80% of the objectives in the *North Carolina Social Studies Standards* for the appropriate course/grade level.		
2. Content (facts/topics/concepts/skills), instructional tools (methodology/strategies/tasks), and assessment tools (methodology/strategies/tasks) are consistent with the philosophy, standards and goals of the *NC Standard Course of Study for Social Studies* for the appropriate course/grade level.		
Comments for Part IA:		

Part IB Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. If two or more items are marked "no" in Part IB, do not complete Parts II, III, and IV.

	Yes	*No*
1. Materials reflect unbiased, non-stereotypical, accurate, comprehensive and current social studies research-based information and practices: authors, consultants, and reviewers include professionals with a wide range of experiences and expertise, including persons with secondary classroom experience.		
2. Materials provide a sufficient number of hands-on inquiries, experiences, and authentic tasks in a variety of contexts (e.g., in-school, out of school, group tasks, independent tasks, discussion, reading) that integrate and support the key concepts, factual content, and disciplinary and critical thinking skills of social studies at a developmentally appropriate level.		
3. Material provides access to or demonstrates concepts and factual content in multiple ways, including in writing, verbally, graphically, as well as through the use of maps, charts, illustrations, and political cartoons.		

4. Diverse groups and balanced viewpoints of events are comprehensively integrated and avoid stereotypic depictions in terms of race, gender or ability.		
5. Materials are relevant to the diversity of students' lives, interests, abilities, and learning styles and promotes interactive and participatory learning.		
6. Religious references shall be uncensored and included in American history textbooks.		

Comments for Part IB:

Part II Pedagogy

A. Specific Criteria	*Yes*	*No*
1. A. Materials ask students to communicate social studies concepts and ideas visually (e.g., maps, charts, graphs), orally and in writing and by explaining, clarifying, and defending their ideas while engaged in discourse with peers and teachers.		
2. B. Materials require students to gather, organize, interpret, analyze, explain and evaluate information from a variety of sources, primary and secondary (i.e., articles, journals, online resources, maps, charts, graphs, illustrations, political cartoons, articles and other artifacts).		
3. C. Issues and key turning points are presented and treated factually and objectively with all major viewpoints represented.		
4. D. Materials integrate cultural, economic, geographic, political, and social aspects of history throughout the text to enhance student understanding and relevance.		
5. E. Materials are thematically and chronologically organized to promote conceptual understanding of history that includes globalization and 21st century issues.		
6. F. Materials include appropriate charts, maps, graphs, primary resources, photographs, political cartoons, and drawings directly related to the goals and objectives of the North Carolina Standard Course of Study.		
7. G. Materials allow for students and teachers to develop skills used by historians to discern information about historic events. (i.e., using primary source documents, detecting bias)		
8. H. Materials provide a balance between western and non-western world content with a strong emphasis on the connectivity of the two.		
9. I. Materials integrate student assessment in the instructional design.		
10. J. Materials include assessment tasks or items that measure mastery of concepts, factual content and skills in a variety of formats.		
11. K. Materials include specific questions or tasks to assist the teacher and student in identifying the concepts, factual content, and skills students have mastered before they begin new material.		
12. L. Materials include assessment tasks or items that can be used as diagnostic or formative instruments that help determine learners' needs, rather than merely as instruments for grading students at the end of a unit or chapter.		

B. Teacher Resources	*Yes*	*No*
1. A. Teacher resources include a summary of material contents.		
2. B. Teacher resources provide instructional and/or behavioral objectives.		
3. C. Teacher resources are well organized, easy to use, and comprehensive.		
4. D. Teacher resources provide for the development, reinforcement, and review of factual content, skills, and concepts.		
5. E. Teacher resources support and provide help in the use of a variety of strategies, techniques, and technologies for differentiated instruction.		
6. F. Teacher resources provide suggestions for evaluation, remediation, acceleration, and feedback.		
7. G. Teacher resources include suggestions for the extension of learning and integration across		

the curriculum.		
8. H. Teacher resources provide ancillary materials for student use.		
9. I. Teacher resources provide supplementary or background information.		
10. J. Teacher resources include answer key(s)		
Comments for Part II:		

Part III Accessibility*(if applicable)*

(Note: Digital considerations may refer to software as well as online resources. The criteria presented here are in addition to the criteria listed in previous sections.)

	Yes	*No*
A. Information retrieval is easy and rapid.		
B. Intuitive icons, menus, and directional symbols are provided that foster independent use.		
C. Graphic design is attractive, colorful, and uncluttered.		
D. Graphic design is not stereotypic or biased and does not contain inaccurate portrayals		
E. All visuals and interactive elements are clearly and accurately labeled.		
F. Appropriate and supportive feedback is provided if applicable.		
G. Options for help and tutorial segments are provided.		
H. Ability to download and save or access content offline.		
I. Save options for games or activities in progress are available when appropriate.		
J. Note-taking feature is available when appropriate.		
K. A record-keeping feature to monitor student progress is available when appropriate.		
L. Teacher has full access to individual student monitoring of activities, assignments, and assessments.		
M. Descriptions of specific hardware requirements for operating the application are provided.		
N. Technical assistance is available and instructions for access are easily understood		
O. Can integrate with various Learning Management Systems (LMS) (Canvas, Google Classroom, etc.)		
P. Functions flawlessly on a variety of platforms at school and home.		
Comments for Part III:		

Part IV Overall Analysis (*For Textbook Commission Use Only)*
These instructional materials meet the criteria _____ **yes**   _____ **no**.

Comments for Part IV: *Additional comments for acceptable or not acceptable in Parts I, II, III, or IV.*

Instructional Materials Review Criteria Sheet – Social Studies Grades 9-12

INSTRUCTIONAL MATERIALS TITLE_____BID NO._____

PUBLISHER_____ COPYRIGHT DATE_____

AUTHOR(S)_____ISBN_____

ADVISOR_____ _____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Indicate Appropriate Course:

Economics and Personal Finance _____

PART I Content

Note: All instructional materials (both digital and print) shall be compatible with the philosophy, standards and objectives in the North Carolina Standard Course of Study, adopted July 2020.

Part IA: Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. **Materials must meet the criteria for both Items A and B. If either item is marked "no" in Part IA, do not complete Parts IB II, III, and IV.**

	Yes	*No*
1. Materials present the main concepts, facts/topics, and skills that support a minimum of 80% of the objectives of the *North Carolina Social Studies Standards* for the appropriate course/grade level.		
2. Content (facts/topics/concepts/skills), instructional tools (methodology/strategies/tasks), and assessment tools (methodology/strategies/tasks) are consistent with the philosophy, standards and goals of the *NC Standard Course of Study for Social Studies* for the appropriate course/grade level.		
Comments for Part IA:		

Part IB Check yes to indicate the instructional materials meet the criteria or check no to indicate the instructional materials do not meet the criteria. If two or more items are marked "no" in Part IB, do not complete Parts II, III, and IV.

	Yes	*No*
1. Materials reflect unbiased, non-stereotypical, accurate, comprehensive and current social studies research-based information and practices: authors, consultants, and reviewers include professionals with a wide range of experiences and expertise, including persons with secondary classroom experience.		
2. Materials provide a sufficient number of hands-on inquiries, experiences, and authentic tasks in a variety of contexts (e.g., in-school, out of school, group tasks, independent tasks, discussion, reading) that integrate and support the key concepts, factual content, and disciplinary and critical thinking skills of social studies at a developmentally appropriate level.		
3. Material provides access to or demonstrates concepts and factual content in multiple ways, including in writing, verbally, graphically, as well as through the use of maps, charts, illustrations, and political cartoons.		
4. Diverse groups and balanced viewpoints of events are comprehensively integrated and avoid stereotypic depictions in terms of race, gender or ability.		

5. Materials are relevant to the diversity of students' lives, interests, abilities, and learning styles and promotes interactive and participatory learning.		
6. Religious references shall be uncensored and included in American history textbooks.		
Comments for Part IB:		

Part II Pedagogy

A. Specific Criteria	*Yes*	*No*
1. Materials ask students to communicate social studies concepts and ideas visually (e.g., maps, charts, graphs), orally and in writing and by explaining, clarifying, and defending their ideas while engaged in discourse with peers and teachers.		
2. Materials require students to gather, organize, interpret, analyze, explain, apply, create, and evaluate information from a variety of sources, primary and secondary.		
3. Materials emphasize the student's awareness of economic and personal financial literacy.		
4. Materials provide the opportunities for the discussion of contemporary and global economic issues.		
5. Materials integrate student assessment in the instructional design.		
6. Materials include assessment tasks or items that measure mastery of concepts, factual content and skills in a variety of formats.		
7. Materials include specific questions or tasks to assist the teacher and student in identifying the concepts, factual content, and skills students have mastered before they begin new material.		
8. Materials include assessment tasks or items that can be used as diagnostic or formative instruments that help determine learners' needs, rather than merely as instruments for grading students at the end of a unit or chapter.		
9. Materials include content that allows students to adequately understand principles of economics and personal finance including those enumerated by the NC General Assembly in Session Law 2019-82 which are: • The true cost of credit • Choosing and managing a credit card • Borrowing money for an automobile or other large purchase • Home mortgages • Credit scoring and credit reports. • Planning and paying for postsecondary education • Other relevant financial literacy issues		

B. Teacher Resources	*Yes*	*No*
1. Teacher resources include a summary of material contents.		
2. Teacher resources provide instructional and/or behavioral objectives.		
3. Teacher resources are well organized, easy to use, and comprehensive.		
4. Teacher resources provide for the development, reinforcement, and review of factual content skills, and concepts.		
5. Teacher resources support and provide help in the use of a variety of strategies, techniques, and technologies for differentiated instruction.		
6. Teacher resources provide suggestions for evaluation, remediation, acceleration, and feedback.		
7. Teacher resources include suggestions for the extension of learning and integration across the curriculum.		
8. Teacher resources provide ancillary materials for student use.		
9. Teacher resources provide supplementary or background information.		
10. Teacher resources include answer key(s)		

Comments for Part II:

Part III Accessibility*(if applicable)*

(Note: Digital considerations may refer to software as well as online resources. The criteria presented here are in addition to the criteria listed in previous sections.)

	Yes	*No*
A. Information retrieval is easy and rapid.		
B. Intuitive icons, menus, and directional symbols are provided that foster independent use.		
C. Graphic design is attractive, colorful, and uncluttered.		
D. Graphic design is not stereotypic or biased and does not contain inaccurate portrayals		
E. All visuals and interactive elements are clearly and accurately labeled.		
F. Appropriate and supportive feedback is provided if applicable.		
G. Options for help and tutorial segments are provided.		
H. Ability to download and save or access content offline.		
I. Save options for games or activities in progress are available when appropriate.		
J. Note-taking feature is available when appropriate.		
K. A record-keeping feature to monitor student progress is available when appropriate.		
L. Teacher has full access to individual student monitoring of activities, assignments, and assessments.		
M. Descriptions of specific hardware requirements for operating the application are provided.		
N. Technical assistance is available and instructions for access are easily understood		
O. Can integrate with various Learning Management Systems (LMS) (Canvas, Google Classroom, etc.)		
P. Functions flawlessly on a variety of platforms at school and home.		
Comments for Part III:		

Part IV Overall Analysis *(For Textbook Commission Use Only)*
These instructional materials meet the criteria _____ **yes**   _____ **no**.

Comments for Part IV: *Additional comments for yes or no responses in Parts I, II, III, or IV.*

SOCIAL STUDIES EDUCATION: EC EVALUATION

SUBJECT_____GRADE _____

INSTRUCTIONAL MATERIALS TITLE _____BID NO._____

PUBLISHER_____ COPYRIGHT DATE _____

AUTHOR(S) _____ ISBN _____

ADVISOR_____

TEXTBOOK COMMISSION MEMBER_____ MEMBER'S SBE DISTRICT _____

Check "__yes__" to indicate the textbook materials __meet the criteria__ or check "__no__" to indicate the textbook materials __do not meet the criteria__.

Appropriateness, Scope, and Resources	*Yes*	*No*
1. Content provides for grade appropriate, yet varied cognitive levels, abilities, and learning styles.		
2. Content is relevant, links to prior knowledge, builds background knowledge, and promotes active student engagement.		
3. Materials provide for a variety of exercises, reviews, assessments, and performance tasks, which provide opportunities for students to collect, organize, interpret, and evaluate information critically and creatively in a variety of formats.		
4. Text and layout are level appropriate, including font, color, spacing legibility, photos, graphics, and captioning.		
5. Materials and supplemental resources include necessary guides such as table of contents, glossary (English & Spanish), index, sidebars, atlas, dictionary/thesaurus, bibliography/footnotes, *see* and *see also* references, web sites, literature links, and support agencies etc.		
6. Key concepts, skills, vocabulary are identified, developed, reviewed, and reinforced.		
7. Materials provide adequate teacher resources, which include suggestions for remediation, acceleration, extension of learning, integration, feedback, and review.		
8. Materials include a summary of contents, instruction and/or behavioral objectives, supplemental or background information, and answer keys/rubrics.		
9. Materials are well organized, easy to use, comprehensive, durable and reasonably sized, with sufficient material for student use.		
10. Resources accommodate the needs of all teachers from beginning through veteran teachers.		
11. Technology meets criteria for accuracy, appropriateness, and scope. It is easy to navigate, visually appealing, and includes a Save/Record feature; if applicable.		

Keeping in mind the needs of EC students and their teachers, please give specifics to support both the yes and no responses.

Comments for yes and no responses:

SOCIAL STUDIES: EL EVALUATION

SUBJECT_____GRADE_____

INSTRUCTIONAL MATERIALS TITLE _____BID NO. _____

PUBLISHER_____ COPYRIGHT DATE _____

AUTHOR(S) _____ISBN _____

ADVISOR_____

TEXTBOOK COMMISSION MEMBER_____MEMBER'S SBE DISTRICT_____

Answer yes to indicate the textbook materials meet the criteria or no to indicate the textbook materials do not meet the criteria.

Appropriateness, Scope, and Resources	*Yes*	*No*
1. Content and materials are grade-appropriate and represent a wide range of cultural and linguistic backgrounds, real-life connections (e.g., objects, models, representations, multimodal texts), and represent the integration of content and language by illustrating explicit and specific content-language connections.		
2. Materials provide for the integration of a multimodal and functional approach to language instruction including interpretative (listening, reading, and viewing) and expressive (speaking, writing, and representing) modes of communication.		
3. Materials include instructional activities and strategies that offer multiple means to opportunities for students to narrate, inform, explain, and argue.		
4. Materials represent an asset-based approach, leverage a wide range of cultural and linguistic backgrounds.		
5. Content is relevant, addresses a variety of cultural aspects, links to prior knowledge, builds background knowledge, and promotes active student engagement.		
6. Materials provide access to grade-level content, systematically include scaffolding that builds student autonomy and supports students to progress from one proficiency level to the next and are linguistically and developmentally appropriate. (e.g., including sentence frames, word banks, etc.).		
7. Materials provide opportunities for students to collect, organize, interpret, and evaluate information critically and creatively in a variety of formats (e.g., including the use of the student's first language).		
8. Text and layout are age/proficiency/grade-level appropriate, including font, color, spacing legibility, photos, graphics, and captioning.		
9. Material includes necessary guides such as a table of contents, glossary (e.g., English & Spanish), index, sidebars, atlas, dictionary/thesaurus, bibliography/footnotes, *see* and *see also* references, websites, literature links, and support agencies, etc.		

10. Key concepts, skills, and vocabulary are identified, developed, reviewed, and reinforced.		
11. Materials provide adequate teacher resources, which include suggestions for acceleration, extension of learning, integration, feedback, and/or review specific to English Learners.		
12. Materials include a summary of contents, instructional objectives, and answer keys/rubrics.		
13. Materials are well organized, easy to use, comprehensive, durable and reasonably sized.		
14. Resources accommodate the EL Support needs of beginning through veteran teachers. Resources also provide information and opportunities for both content teachers and language teachers, to increase their own understanding of the concepts specific to ELD Standard 5: Language for Social Studies.		
15. Technology is easy to navigate, visually appealing, and ideally includes technology for assistive purposes (e.g., dictionaries, glossaries, screen readers, Save/Record features, etc.) and for supporting expression and communication.		

Keeping in mind the linguistic needs of EL students and their teachers, please give specifics to support both the yes and no responses.

Comments for yes and no responses:

NORTH CAROLINA STATE BOARD OF EDUCATION
STANDARD TEXTBOOK CONTRACT

THIS CONTRACT, by and between the NORTH CAROLINA STATE BOARD OF EDUCATION, hereinafter referred to as the <u>STATE BOARD</u>, and _____corporation having its principal place of business in_____, hereinafter referred to as SELLER.

W I T N E S S E T H

WHEREAS, the STATE BOARD has authority to enter into this contract under Article 8, Part 3 of Chapter 115 of the General Statutes of North Carolina; and WHEREAS, the STATE BOARD has adopted certain textbooks, identified below, for use in the public schools of North Carolina; and WHEREAS, the SELLER has agreed to sell and the STATE BOARD has agreed to buy as many of said adopted textbooks as may be required by the STATE BOARD during the term of this contract and any extension, subject always to the terms and conditions of this contract.

NOW, THEREFORE, the STATE BOARD and SELLER agree, for themselves, their successors and assigns, as follows:

<u>PART I</u>
(1) <u>Effective Date and Term</u>. This agreement shall become effective on January 3, 2023 and shall continue in effect through June 30, 2028.

(2) <u>Renewal</u>.   The STATE BOARD, solely at its option, may renew this contract on the terms and conditions set forth herein for an additional term of up to two years by providing the SELLER with written notice of its decision to exercise its right to renew no later than March 1 of the fifth year of this contract.

<u>PART II</u>
(3) <u>Prices and Copies Required</u>.   During this contract the SELLER will sell and furnish to the STATE BOARD for use in North Carolina public schools, and public and private institutions of higher education in North Carolina that have approved teacher education programs, as many copies of the following textbooks (attached list of adopted titles), at the prices indicated in the vendor's cost proposal spreadsheet, as shall be required to satisfy the demand therefore. SELLER will provide, at no cost, teacher editions for each adopted textbook in the amount of one (1) teacher edition for each teacher using their textbooks in the classroom for the term of the contract. SELLER will also provide, at no cost, one teacher edition or one pupil edition, if teacher edition is not available, for each college with a teacher education department approved by the North Carolina Department of Public Instruction. (Attached list of adopted titles)

(4) <u>Title to Textbooks</u>.   Title to textbooks ordered by the STATE BOARD, and risk of loss of said textbooks, shall pass to the STATE BOARD upon actual receipt of said textbooks from SELLER'S carrier and acceptance of said textbooks by the manager of the STATE BOARD'S textbook warehouse. Title to unused textbooks returned to SELLER by the STATE BOARD, and risk of loss of said textbooks, shall pass to SELLER upon actual receipt of said textbooks by SELLER from the STATE BOARD'S carrier.

(5) <u>Time of Payment</u>.   Payment for textbooks purchased shall be made within one hundred twenty (120) days of passing of title for said textbooks to the STATE BOARD. At its option, however, the STATE BOARD during the second and subsequent years of this contract may order textbooks and may return any unused textbooks ordered by December 1 of that year, to the SELLER with freight costs paid by the STATE BOARD.

(6) <u>Refund for Unused Books</u>.   Unused textbooks which remain in the STATE BOARD'S warehouse upon termination of this contract may be returned to the SELLER for full credit. Payment to the STATE BOARD for unused textbooks shall be made within sixty (60) days of the passing of title back to the SELLER.

(7) <u>Bond</u>.   The SELLER has executed and delivered to the STATE BOARD a bond in the sum of $00.00, payable to the State of North Carolina conditioned upon the faithful and complete performance of this contract and further conditioned with sureties as appear there from. Should the STATE BOARD at any time during the continuance of this contract require additional security or additional bond for the faithful performance of this contract, the SELLER, after thirty days' notice, shall provide additional security or execute and deliver an additional bond as required by the STATE BOARD.

(8) <u>State Appropriations</u>.   It is understood that this contract is made subject to State funds being appropriated by the General Assembly for this program.

PART III
(9) <u>Incorporation of Statutes</u>.   This contract is executed in accordance with the provision of Article 8, Part 3 of Chapter 115C of the General Statutes of North Carolina. Said statutes are hereby incorporated by reference and made a part of this contract as if fully set forth herein. Specific reference is made to G.S. 115C-95 which provides as follows:
"Every contract made by the Board with the publisher of any school textbook on the State-adopted list shall be deemed to have written Therein a condition providing that if that publisher, during the life of his contract with this State, contracts with any other governmental unit or places that textbook on sale anywhere in the United States for a price less than stipulated in his contract with the State of North Carolina, the publisher shall immediately furnish that textbook to this State at a price not greater than that for which the textbook is furnished, sold or placed on sale anywhere else in the nation."

(10) <u>Incorporation of Other Documents</u>.   The STATE BOARD'S Invitation to Submit Textbooks for Evaluation and Adoption, previously provided to the SELLER, and the Cost Proposal Form submitted by the SELLER in response to this Invitation are hereby incorporated by reference and made a part of this contract as if fully set forth herein. In the event of any conflict between any of these documents and this contract, the terms of this contract shall control.

(11) <u>Applicable Law</u>.   This contract shall be governed by and construed in accordance with the laws of the State of North Carolina.

PART IV
(12) <u>Revised or Later Copyrighted Editions</u>: The Seller shall furnish to the State Superintendent of Public Instruction the new edition for both the pupil edition and the teacher edition of the new or revised edition with Form B submitted with the new or revised edition. A list of changes must accompany the new or revised edition. All changes will be reviewed to determine as to whether the new edition is substantially similar in all respects so as not to result in inconvenience or confusion to

the teacher or the student. Upon written approval of the substitution by the State Superintendent of Public Instruction, the Seller shall furnish for the remainder of the contract period, and any extension thereof, such revised or later copyrighted edition of the textbook, subject to all the terms of this contract, including price.

(a) <u>Modification</u>. (Digital Text Only) Typographical or editorial changes. Any typographical or editorial change that is made to a digital text must be sent to the State Superintendent of Public Instruction prior to the Seller making any changes electronically in the digital text. The State Superintendent of Public Instruction must have a minimum of 10 business days' notification of typographical or editorial changes that are the result of significant errors in the adopted text. A "significant error" is a factual typographical error that the State Board of Education, Department of Public Instruction or the Seller determines within the context of the intended use of the textbook will substantially interfere with student learning. A change in knowledge that occurs subsequent to publication shall not constitute a significant error.

(b)   Revised or Later Edition (Substitutions for Digital Text Only)   The Seller may submit for substitution a new edition for the older edition. The Seller shall submit to the State Superintendent of Public Instruction a digital format of the new edition for both the pupil edition and the teacher edition of the new or revised edition with Form M submitted with the new or revised edition. A list of changes must accompany the new or revised edition. All changes will be reviewed to determine as to whether the new edition is substantially similar in all respects so as not to result in inconvenience or confusion to the teacher or the student. Upon written approval of the substitution by the State Superintendent of Public Instruction, the Seller shall furnish for the remainder of the contract period, and any extension thereof, such revised or later copyrighted edition of the textbook, subject to all the terms of this contract, including price.

(13) <u>Manufacturer's Standards</u>.   All textbooks provided hereunder shall be manufactured in accordance with the OFFICIAL MINIMUM MANUFACTURING STANDARDS AND SPECIFICATIONS FOR TEXTBOOKS established by the Advisory Commission on Textbook Specifications, or shall exceed such standards. Compliance with such standards does not relieve SELLER of obligations arising out of any other warranties applicable to the textbooks sold hereunder, whether such warranties are expressed or implied.

(14) <u>License</u>.   The SELLER grants to the STATE BOARD the license to produce, or to cause to be produced, Braille, large print and audio cassette tape versions of the textbooks included in this contract, to be used solely in the North Carolina public schools for the benefit of handicapped students.

<u>PART V</u>
(15) <u>Time of Delivery</u>.   Time of delivery is critical to the STATE BOARD. If SELLER fails to deliver textbooks within forty-five (45) calendar days of the date an order is placed by the STATE BOARD, it is agreed that the STATE BOARD may, in a suit instituted for that purpose, against the SELLER and against the sureties on the bond, recover the sum of one hundred dollars ($100.00) for each day's delay in receipt of the textbooks. An order is placed when SELLER receives the STATE BOARD'S purchase order and delivery is made on the day the last textbook on said order is received and accepted at the State Textbook Warehouse. Should the SELLER determine that he will be unable to make timely delivery, he may request an extension of time for delivery. This request may be granted at the discretion of the State Superintendent, but may not be unreasonably withheld. If written approval for extension is granted, liquidated damages will not be assessed, unless the textbooks are not delivered within the period of the extension.

(16) <u>Access to Instructional Material</u>. (Digital Text Only) It is of critical importance to the State Board of Education that students have access to digitized instructional material at school and at home. If the Seller fails to provide access to digitized instructional material for more than 3 hours between the hours of 8:00 A.M. and 10:00 P.M. Sunday through Friday for more than a 10-day period within the school year, it is agreed that the State Board may institute legal action, against the Seller and against the sureties of the bond to recover the sum of one hundred ($100.00) for each day without access to the digitalized instructional material, plus any other damages or fees to which the State Board is legally entitled.

(17) <u>Priority Delivery</u>.   The SELLER will make no delivery of any textbook included in this contract to any local school authority, public or private institution of higher education, or other educational agency in this State while any pending order of the STATE BOARD is unfilled, except upon approval by the State Superintendent.

<u>PART VI</u>
(18) <u>Errors in textbooks</u>
(a)   Express Warranty

The SELLER will make commercially reasonable efforts to correct all factual and typographical errors found in the adopted textbooks before textbooks are shipped to North Carolina and shall expressly warrant that those errors are corrected prior to shipment.

(b) Affidavit

Each SELLER shall file an affidavit signed by an authorized official of the company certifying that all of its textbooks to be shipped to North Carolina have been thoroughly examined for factual and typographical errors and to the best of his/her knowledge the textbooks are free from such errors. Such affidavit must be filed with DPI Procurement Office, prior to the shipment of any text.

(c) Errors Identified by Seller Subsequent to Textbook Shipment

1. The SELLER shall immediately notify DPI of any factual or typographical errors it identifies subsequent to shipment.

2. The SELLER shall correct any factual or typographical errors identified by the SELLER subsequent to shipment no later than June 30 of the initial contract year and annually thereafter by sending errata sheets as prescribed by applicable sections of the current edition of the Chicago Manual of Style.

3. The SELLER shall correct any significant errors identified by the SELLER by sending errata sheets as prescribed by applicable sections of the current edition of the Chicago Manual of Style within 30 calendar days of identification.

4. Whenever the total number of identified significant errors, as defined below, exceeds 1% of the total number of pages in the text; the SELLER will pay to the SBE $100.00 in liquidated damages for every additional significant error that the SELLER identifies.

(d) Errors identified by the SBE and others subsequent to Textbook Shipment

1. The SELLER shall correct any factual or typographical errors identified by the SBE, DPI, local boards of education or any of their officials, employees or agents by sending errata sheets as prescribed by applicable sections of the current edition of the Chicago Manual of Style no later than the following June 30 of the year.

2. The SELLER shall correct any significant errors identified by the SBE, DPI, local boards of education or any of their officials, employees or agents by sending errata sheets as prescribed by applicable sections of the current edition of the Chicago Manual of Style within 30 calendar days of notification to the SELLER.
3. Whenever the total number of identified significant errors, as defined below, exceeds 1% of the number of pages in the text, the SELLER shall pay to the SBE $500.00 in liquidated damages for every additional significant error that the SBE, DPI, local boards of education or any of their officials, employees or agents identifies in the text prior to the SELLER's identification of that error and notification of the SBE under paragraph 17(c)(1) of this Part.

(e)   Failure to Correct Errors

The SELLER's failure to correct errors, as set forth herein, will be deemed a breach of this contract. The SBE will be entitled to pursue any and all remedies available to it.

(f)   Definitions

1. "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 non-print, 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. Textbook also includes any instructional materials intended for use by the teacher.

2.   A "significant error" is a factual or typographical error that the SBE or DPI determines within the context of the intended use of the textbook will substantially interfere with student learning. A change in knowledge that occurs subsequent to publication shall not constitute a significant error.   A significant error repeated in a single item or contained in both the student and teacher components of instructional material shall be counted once for the purpose of determining liquidated damages.

PART VII
(19) Entire Understanding.   This contract represents the entire understanding of the parties and shall not be modified or altered in any way except by written instrument executed by both parties. Assignment of SELLER'S obligations under this contract, in whole or in part, is a modification of this contract and shall not be accomplished without the prior written agreement of the STATE BOARD.

(20) Continuations of Rights under Existing Contracts. This contract is not intended to be a novation of or substitution for any existing contract(s) between the STATE BOARD and the SELLER and shall not alter, amend, diminish, or extinguish the parties' rights or obligations under any existing contract(s).

IN WITNESS WHEREOF, the STATE BOARD has caused this contract to be executed by its Chairman and Secretary and the Seal of the STATE BOARD to be hereto affixed, and the SELLER

has caused the same to be executed by its President, or other duly authorized officer, attested by its Secretary, and its common seal to be hereto affixed, all by an order and resolution of its Board of Directors, duly passed.

THE STATE BOARD OF EDUCATION   SELLER

_____   _____
SECRETARY (STATE BOARD)   PRESIDENT (SELLER)

Approved as to form: ATTEST

_____   _____
Legal Counsel   Date   SECRETARY(SELLER)   Date
(BOARD'S SEAL)   (SELLER'S SEAL)

Bond No. _____

State of North Carolina Surety Bond

KNOW ALL MEN BY THESE PRESENTS, That _____,

doing business in the city of _____, in the State of _____,

as principal, and _____

as surety, are held and firmly bound unto the State of North Carolina in the penal sum of

_____Thousand dollars, to the payment of which sum we bind ourselves,

our heirs, assigns, successors, and representatives.

Given under our hands and seals, this the _____day of_____20___.

The condition of this bond is that if the said_____

shall well and truly observe, keep, maintain, and preserve, the terms of the agreement hereto attached,

made with the State Board of Education of the State of North Carolina for the sale, supply, distribution,

and furnishing of textbooks mentioned in the said contract for the public schools in the said State of

North Carolina, and shall faithfully, honestly, and exactly perform their said contract, and shall do the

acts and deeds as by said agreement and the laws of the State are required and enjoined, and will pay all

reasonable attorneys' fees in case of recovery in any suit upon this bond, the same shall be null and void;

otherwise, in full force and effect. And it is further provided, as required by the law of the State of

North Carolina establishing a Textbook Commission, and so understood and agreed by both principal

and sureties hereto, that this bond shall not be exhausted by a single recovery, but may be sued on from

time to time until the full amount thereof shall be recovered.

WITNESS our hands and seals, this the _____ day of _____ 20 ____.

	_____
	Print Name of Principal
_____	_____
(Witness)	Signature of Officer of the Principal
	_____
	Print Name of Attorney-in-Fact
_____	_____
(Witness)	Signature of Attorney-in-Fact

AUTHORITY TO SUBMIT BIDS FOR TEXTBOOKS

Pursuant to issuance of the 2022 *Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina*, the signer agrees that, if this bid is accepted in due course by the offeree, the company will enter into a contract with the North Carolina State Board of Education to provide said Board with its public school requirement for the textbooks listed below at the prices quoted. The Contract to be entered into shall be in accordance with the contract example included in the *2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina*. Please furnish the following information for completing a textbook contract, if adopted.

Please check one:
Corporation   _____
COMPANY   Partnership   _____
Sole Proprietorship   _____
Other (designate)   _____

Address of Principal Place of Business

City, State, Zip

PRESIDENT or DESIGNEE
Print

PRESIDENT or DESIGNEE
Signature

DATE

NORTH CAROLINA
COST PROPOSAL SPREADSHEET

(SAMPLE)

Publisher Name: _____ **Date:** _____ **Page:** ___ **of** _____

I. Inventoried: Student and teacher editions are provided in hard-copy and/or digital formats. Copies are purchased through State Textbook Warehouse.

TITLE	Grade Level or Course Title	ISBN	Publisher	Copyright/ Edition	NIMAS Compliant Files? Yes or No (See attachment 7)	Net Wholesale	NC Warehouse Allowance	Bid Price
English Language Development								
English Language Development Student Edition	**Grade 6**	**9781234567891**	**LMN Publishing**	**2022**	**Yes**	**55.00**	**4.40**	**50.60**
English Language Development Teacher Edition	**Grade 6**	**9782345678912**	**LMN Publishing**	**2022**	**Yes**	**70.00**	**5.60**	**64.40**
English Language Development Digital Edition	**Grade 6**	**9782345678912**	**LMN Publishing**	**2022**	Yes	**70.00**	**5.60**	**64.40**

Net Wholesale Price (Lowest prices available in U.S.), f.o.b. Publisher
NC Warehouse Allowance: Calculated at 8% of the net wholesale price
Bid Price: Warehouse allowance deducted from the net wholesale price
*See page 11 of this Invitation for more information on cost calculation.

II. Non-inventoried: Accompanying student materials (ASM) and Enrichment Materials (EM) are provided at no charge. Additional copies are purchased directly from the publisher.

TITLE	GRADE LEVEL/ COURSE	ISBN	Ratio Number per classroom; collection purchased; per teacher, per school, per district (specify), also frequency of offer such as annually, quarterly, monthly	Price for Additional Copies
Accompanying Student Materials (ASM) Maximum 4 Items				
English Language Development ASM 1	6	**9781122334455**	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	**35.00**
English Language Development ASM 2	6	**9782233445566**	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	**6.25**
English Language Development ASM 3	6	**9783344556677**	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	**7.15**
English Language Development ASM 4	6	**9784455667788**	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	**6.25**
Enrichment Materials (EM) Maximum 7 Items				
English Language Development EM 1	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 Development 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 Development 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 Development 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**
Enrichment Materials Increment:	**Each purchase of an additional 25 student editions above an initial purchase of 100 will entitle the LEA to select one additional item from the Enrichment Material List above.**			

NORTH CAROLINA
COST PROPOSAL SPREADSHEET
(SAMPLE)

Publisher Name: _____ **Date:** _____ **Page:** ___ **of** _____

I. Inventoried: Student and teacher editions are provided in hard-copy and/or digital formats. Copies are purchased through State Textbook Warehouse.

TITLE	Grade Level or Course Title	ISBN	Publisher	Copyright/ Edition	NIMAS Compliant Files? Yes or No (See attachment 7)	Net Wholesale	NC Warehouse Allowance	Bid Price
Social Studies								
Social Studies Course 1 Student Edition	**Economics and Personal Finance**	**9781234567891**	**XYZ Publishing**	**2022**	**Yes**	**55.00**	**4.40**	**50.60**
Social Studies Course 1 Teacher Edition	**Economics and Personal Finance**	**9782345678912**	**XYZ Publishing**	**2022**	**Yes**	**70.00**	**5.60**	**64.40**
Social Studies Course 1 Digital Edition	**Economics and Personal Finance**	**9782345678912**	**XYZ Publishing**	**2022**	Yes	**70.00**	**5.60**	**64.40**

Net Wholesale Price (Lowest prices available in U.S.), f.o.b. Publisher
NC Warehouse Allowance: Calculated at 8% of the net wholesale price
Bid Price: Warehouse allowance deducted from the net wholesale price
*See page 11 of this Invitation for more information on cost calculation.

II. Non-inventoried: Accompanying student materials (ASM) and Enrichment Materials (EM) are provided at no charge. Additional copies are purchased directly from the publisher.

TITLE	GRADE LEVEL/ COURSE	ISBN	Ratio Number per classroom; collection purchased; per teacher, per school, per district (specify), also frequency of offer such as annually, quarterly, monthly	Price for Additional Copies
Accompanying Student Materials (ASM) Maximum 4 Items				
Social Studies Course ASM 1	**Economics and Personal Finance**	**9781122334455**	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	**35.00**
Social Studies Course ASM 2	**Economics and Personal Finance**	**9782233445566**	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	**6.25**
Social Studies Course ASM 3	**Economics and Personal Finance**	**9783344556677**	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	**7.15**
Social Studies Course ASM 4	**Economics and Personal Finance**	**9784455667788**	Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption	**6.25**
Enrichment Materials (EM) Maximum 7 Items				
Social Studies Course EM 1	**Economics and Personal Finance**	**9781912345678**	Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions), upon request, initial year of purchase	**250.00**
Social Studies Course EM 2	**Economics and Personal Finance**	**9781923456789**	Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions), upon request, initial year of purchase	**185.00**
Social Studies Course EM 3	**Economics and Personal Finance**	**9781934567891**	Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions), upon request, initial year of purchase	**40.00**
Social Studies Course EM 4	**Economics and Personal Finance**	**9781956789123**	Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions), upon request, initial year of purchase	**40.00**
Enrichment Materials Increment:	**Each purchase of an additional 25 student editions above an initial purchase of 100 will entitle the LEA to select one additional item from the Enrichment Material List above.**			

FORM B

STATE OF NORTH CAROLINA

STATEMENT OF PUBLISHER SUBMITTING TEXTBOOKS FOR ADOPTION

One copy of this form signed by an official of the publishing company submitting books for adoption must be attached to the inside front cover of at least one official sample textbook submitted, plus additional copies when requested by the adopting agency.

Name of Publisher_____

Address _____

Title offered for adoption_____

Grade level/course_____ _____

Copyright and edition_____ ISBN No._____

DPI Identification Number_____

CLASS OF TEXTBOOK:

        A ___B___C___D___E___F___AA___BB___CC___   College_____ Meets MSST

                                        College_____ Meets with approved deviations

        Grades 9 - 12 only, Class I___   Class II___   College_____ Does Not Meet MSST

PAPER: Basis weight _____lbs.

PRINTING: Printing Symbol: _____

                Margins: Back_____" Head _____" Front _____ " Foot _____"

BINDING:

        Number of pages (total)_____ Pages per signature _____   Bulk _____"

        Trim size: Width _____" Height _____"   Endsheet _____lbs

        Inserts: Number and kind _____

                            Method of attachment _____

        Transparent overlays   Number and kind _____

                            Method of attachment _____

        Reinforcements: Visible drill joints _____Concealed muslin joints_____

        Binding method: Sewed _____   Stitched _____   Adhesive _____

                            Wires: Side _____   Saddle _____   Mechanical _____

        Lining up: Supers: Number _____Headbands _____   Tightback_____

COVERS: Cover boards: Thickness in points_____

                Cover material: Non woven: Type II _____ Type III _____

                            Woven fabric group designation _____

                            Non-consumable soft-cover texts, Class AA _____ BB ____ CC _____

                            Other _____

        Cover graphics: Lithographed_____ Screened_____ Stamped _____Other _____

        Cover top coating: _____

SPECIAL FEATURES_____

The undersigned publisher submitting the textbook stated herein certifies (on the basis of tests of materials in their original conditions and in respect to the mechanical specifications employed in manufacture) that the filed sample conforms in every respect to the Manufacturing Standards and Specifications for Textbooks in the State of North Carolina with the exception of: (explain deviations fully below or on a separate sheet).

Revised 12/2019   Copyright ©2019 State Instructional Materials Review Association (SIMRA)

And the undersigned Publisher agrees, in the event the contract for supplying the textbook listed herein is awarded to it, that:

Official sample conforms: texts supplied will conform	1. The official sample confirms to or exceeds in every particular the Manufacturing Standards and Specifications for Textbooks including applicable temporary, supplemental adoptions and amendments, and that all copies subsequently furnished under such contract will be identical to or the equivalent of the official sample and will likewise conform to or exceed these same specifications.
Official sample does not conform; texts supplied will conform	2. Although the official sample deviates in certain particulars delineated herein from the *Manufacturing Standards and Specifications for Textbooks* including applicable temporary, supplemental adoptions and amendments, all copies subsequently furnished under such contract will conform to or exceed every specification.
Official sample conforms except for stated deviations; texts supplied will conform except for stated deviations	3. The official sample conforms to or exceeds every specification of the *Manufacturing Standards and Specifications for Textbooks* including applicable temporary, supplemental adoptions and amendments, except for those deviations expressly delineated herein, and all copies subsequently furnished under such contract will be identical to or the equivalent of the official sample, and will conform to or exceed every specification of the Manufacturing Standards and Specifications for Textbooks including applicable temporary, supplemental adoptions and amendments except for those expressly delineated and accepted by the adopting agency.
Official sample does not conform; texts supplied will not conform	4. Neither the official sample, nor copies subsequently furnished under such contract, will conform to any particular specification of the *Manufacturing Standards and Specifications for Textbooks* including applicable temporary, supplemental adoptions and amendments, although all copies furnished under such contract will be identical to or the equivalent of the original sample.

The undersigned publisher agrees to be bound under Clause One, Two, Three, and Four of this warranty. The Publisher shall furnish to the state for appropriate testing, when requested, samples of materials used in this publication.

Signed _____

Name_____

Title _____

Company _____

Date _____

Revised 12/2019

FORM M

STATE OF NORTH CAROLINA

STATEMENT OF PUBLISHER SUBMITTING ELECTRONIC MEDIA FOR ADOPTION

One copy of this form signed by an official of the publishing company submitting electronic media for adoption must be submitted to the adopting agency.

Name of Publisher _____

Address_____

Title of Textbook (Core Instructional Program)_____

Title of Electronic-based Program (if different from textbook)_____

Copyright/Version _____
ISBN_____

Medium	Industry Standard	Contact
Audio Compact Disc	ANSI Standard (Red Book)	info@ansi.org
CD-ROM	ANSI (Yellow Book)	info@ansi.org
DVD	DVD Forum Standard	http://www.dvdforum.org/forum.shtml
DVD-ROM	DVD Forum Standard	http://www.dvdforum.org/forum.shtml
Online	W3C Recommendations	https://www.w3.org

DEVIATIONS

The publisher submitting the electronic medium stated herein certifies (on the basis of tests of materials in their original conditions and in respect to the mechanical specifications employed in manufacture) that the filed sample conforms in every respect to the industry standard for that medium with the exception of the following: (explain deviations fully below or on a separate sheet.)

WARRANTY OF PUBLISHER

And the undersigned publisher agrees, in the event the contract for supplying the textbook listed herein is awarded to it, that:

Official sample conforms: texts supplied will conform	1. The official sample conforms to or exceeds in every particular the industry standard for the medium, and that all copies subsequently furnished under such contract will be identical to or the equivalent of the official sample, and will likewise conform to or exceed these same specifications.
Official sample does not conform: texts supplied will confirm	2. Although the official sample deviates in certain particulars delineated herein from the industry standard for the medium, all copies subsequently furnished under such contract will conform to or exceed every specification.
Official sample conforms except for stated deviations; texts supplied will conform except for stated deviations	3. The official sample conforms to or exceeds every specification of the industry standard for the medium, except for those deviations expressly delineated herein, and all copies subsequently furnished under such contract will be identical to or the equivalent of the official sample and will conform to or exceed every specification of the Manufacturing Standards and Specifications for Textbooks including applicable temporary, supplemental adoptions and amendments, except for those expressly delineated and accepted by the adopting agency.
Official sample does not conform; text supplied will not conform	4. Neither the official sample, nor copies subsequently furnished under such contract, will conform to any particular specification of the industry standard for the medium, although all copies furnished under such contract will be identical to or the equivalent of the original sample.

The undersigned Publisher agrees to be bound under Clause One, Two, Three, and
Four of this warranty. The publisher shall furnish to the state for appropriate testing, when requested, samples of materials used in this publication.

Signed_____

Name_____

Title_____

Company_____

Date_____

ACCESSIBLE ELECTRONIC FILES OF PUBLISHER MATERIALS

Electronic files of print and non-print textbook materials are needed to ensure the timely production of the materials in specialized formats (e.g., Braille). The NC Department of Public Instruction has adopted the National Instructional Materials Accessibility Standard (NIMAS) in accordance with the Individuals with Disabilities Education Improvement Act of 2004 (P.L. 108-446), for the purpose of providing instructional materials to blind students or other students with disabilities. The Department is also coordinating with the National Instructional Materials Access Center (NIMAC), which is serving as a repository for publishers' compliant files.

Additional information about NIMAS: **http://aem.cast.org/**
Additional information about NIMAC: **http://www.nimac.us/**

Publishers will submit NIMAS-compliant files of state adopted textbooks and other core textbook materials by December 1, 2022. These files will be submitted to either Amy Hobgood at NCDPI or NIMAC using the ISBNs submitted for NC adoptions. Should a publisher opt not to send files for a particular book, it must provide the Textbook Warehouse with the textbook in the specialized requested format at the same time as print materials are delivered.

A separate file listing the structure of the primary files must be provided to Amy Hobgood at amy.hobgood@dpi.nc.gov. This file should be labeled DISKLIST.TXT. In addition, all special instructions (e.g., merging of materials such as marginal notes kept in a separate file) should be noted in this file.

Efforts should be made to update files to duplicate exactly the adopted print or non-print version of the textbook materials including corrections and changes.

When files are accepted by NIMAC, please notify Amy Hobgood at amy.hobgood@dpi.nc.gov and provide her with notice that files have been sent to NIMAC.

AFFIDAVIT

STATEMENT OF PUBLISHER SUBMITTING INSTRUCTIONAL MATERIAL FOR ADOPTION TO THE NORTH CAROLINA STATE BOARD OF EDUCATION

One copy of this form signed by an official of the Publishing Company submitting instructional material for adoption must be sent to the Department of Public Instruction with the Contract and Surety Bond.

Name of Publisher: _____

Address: _____

Title(s) Offered for Adoption: **(Please list all titles submitted along with ISBN number. A separate list may be attached.)** _____

The undersigned certifies that he/she is authorized to and does certify that the above named textbook(s) has/have been proofread for factual and typographical errors, and to the best of my knowledge will be free from such errors.

Signed _____

Name _____

Title _____

Company _____

Date _____

Subscribed and sworn to before me this _____ (date).

(Signature and seal of notary public)

Notary Public
My commission expires: _____ (date).

Bid Proposal Submission Checklist
(See pages 9 – 11 for complete details)

Bid proposals must be submitted both electronically and as hard copies as described in the bid proposal information section of the Invitation.

	Bid Submission Checklist	Reference(s)
•	Submit written questions regarding the 2022 Invitation	pages 6, 94
•	Request bid identification numbers	pages 6, 94

•	Submit a completed bid proposal which must include:
	  • The entire 2022 Invitation
	  • A completed transmittal letter
	  • Authority to Submit Bids for Textbooks completed (attachment 3)
	  • Cost proposal spreadsheet with costs (attachment 4)
	  • Cost proposal spreadsheet without costs (attachment 4)
		pages 10 – 12, 82 – 85

•	Submit a USB flash drive (submit with the hard copy only) which must include:
	  • A signed, original copy of the bid proposal
	
	  • Cost proposal spreadsheet (Excel spreadsheet) with costs
	  • Cost proposal spreadsheet (Excel spreadsheet) without costs
		page 10

•	Submit electronic copies using the NC platform for publishers	pages 7, 10
•	Mail hard copies to DPI: 2022 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina NC Department of Public Instruction Attn: Dr. Carmella Fair, Digital Teaching and Learning 301 N. Wilmington Street Raleigh, NC 27601	pages 10, 94

Bid Sample Materials Checklist
(See pages 12 – 15 for complete details)

Publishers will submit bid sample materials electronically through the NC platform for publishers. NCDPI will provide access to the site to publishers who request bid identification numbers.

	Bid Sample Materials Checklist	Reference(s)
•	Publishers must provide print materials in electronic PDF format.	pages 1, 13, 18
•	Publishers must provide access information (URL, login information, etc.) for technology-based programs or other non-print materials in the NC platform for publishers.	pages 1, 2, 17, 19
•	Publishers submitting technology-based programs or other non-print materials must provide specific instructions on how to navigate all submitted digital materials through their online platform. Navigation instructions may be provided by video or screen cast no longer than 10 minutes in length and/or in an electronic document.	pages 2, 13, 14
•	Correlations to the North Carolina Standard Course of Study for English Language Development are required for each submission and must be provided through the NC platform for publishers. Correlations to the North Carolina Standard Course of Study for social studies are required for each submission and must be provided through the NC platform for publishers.	page 7, 17 – 20
•	DPI official bid samples must include all bid items listed on the cost proposal spreadsheet (print, technology-based and nonprint). DPI Official Samples must be mailed to the Textbook Warehouse.	pages 2, 14 – 16
•	DPI official bid samples must include Form B and Form M as described in the Invitation.	Page 15 Attachment 5 pages 86-87 Attachment 6 pages 88-89

REQUIREMENTS

Textbook materials not submitted in accordance with the requirements set forth within this Invitation will not be considered or adopted. **Nothing will be accepted after any of the deadlines listed in the 2022 _Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina_.**

ALL bid submissions must be delivered to the following:

      2022 Invitation to Submit Textbook for Evaluation and Adoption in North Carolina
      NC Department of Public Instruction
      Attn: Dr. Carmella Fair, Digital Teaching and Learning
      301 N. Wilmington Street
      Raleigh, NC 27601

ALL inquiries regarding identification number assignment must be in writing and emailed to:

      Dr. Carmella Fair
      Instructional Resource Consultant
      Digital Teaching and Learning Division
      Textbook Adoption Services
      North Carolina Department of Public Instruction
      Email: nctextbooks@dpi.nc.gov

ALL inquiries regarding directions for packing and shipping must be directed to:

      Dr. Carmella Fair
      Instructional Resource Consultant
      Digital Teaching and Learning Division
      Textbook Adoption Services
      North Carolina Department of Public Instruction
      Telephone: (919) 807-3214
      Email: nctextbooks@dpi.nc.gov

ALL other inquiries must be in writing and emailed to the following email address:
kyna.brands@dpi.nc.gov