Meeting With Publishers

NC Department of Public Instruction

March 13, 2020
Agenda

• Welcome
• Overview of the NC Textbook Adoption Process
• Bid Submission Process
• Evaluation Setup, Logistics, Removal of Materials
• Next Steps
• Closing
Overview of the NC Textbook Adoption Process
Textbook Adoption

INVITATION
Call for publishers to submit bids

EVALUATION
Review for the alignment of materials to standards

RECOMMENDATIONS
Present a list of materials to the State Board of Education for adoption

HIGH QUALITY Instructional Materials at the LOWEST COST
§ 115C-85
Defines textbooks

"textbook" means systematically organized material comprehensive enough to cover the primary objectives outlined in the standard course of study for a grade or course. Formats for textbooks may be print or 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.
Non-Print Materials

• Submissions may include web- and subscription-based materials
Why Textbook Evaluation and Adoption?
Benefits to Districts/Schools

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

• High profile in the state
  – Titles placed on the SBE approved, adopted list
  – Districts/schools encouraged to purchase textbooks on the adopted list

• Cost savings
  – Centralized shipping to the NC Textbook Warehouse
Who is involved?
General Assembly

• Allocates textbook funding that is then allotted to districts based on their average daily membership
• Passes laws to govern the textbook adoption process including giving the authority to adopt textbooks to the State Board of Education
Public School Law
§ 115C-85 through § 115C-102

Examples:

• § 115C-85. Defines textbooks

• § 115C-86. Directs the State Board of Education to select and adopt textbooks aligned to the Standard Course of Study

• § 115C-89. Requires the SBE to develop rules and procedures for publishers to submit bids and sign contracts
Governor

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

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

• Selects and adopts textbooks as codified in the General Statutes of North Carolina
• Adopts policies governing the textbook adoption process
TEXTBOOK ADOPTION

GENERAL STATUTES
§ 115C-85 THROUGH § 115C-102

SBE POLICIES
TEXT-000 THROUGH TEXT-008
Textbook Commission

- Primary responsibility is to evaluate textbooks and other duties as contained in § 115C-88 and § 115C-89 and TEXT-000 – TEXT-008
- Consists of twenty-three members: teachers, principals, parents, and a local superintendent

Note: Commission members select advisors to assist with the evaluation
Textbook Evaluation Advisors

• Assist the Commission in the evaluation of the textbooks
• Vary for each adoption
• Work under the direction of the Textbook Commission members
• Comprised of teachers certified in the area under evaluation (e.g., Mathematics and CTE for the 2020 adoption)
• Preferred that evaluators are currently teaching in the area under evaluation
Publishers

• Company or provider of textbooks/instructional materials
• Publishers must be registered with the NC Publishers’ Registry to be invited to participate in the submission, evaluation, and adoption process
NCDPI
Digital Teaching and Learning Division - Textbook Adoption Staff

• Assist the State Superintendent in the implementation of the SBE textbook policies
• Support the Textbook Commission members and their advisors
• Communicate with the Publishers via the NC Publishers Registry
• Collaborate with Textbook Warehouse Staff
What is the Process?
Adoption Process

• DPI content consultants develop the criteria for evaluation and selection
• DPI drafts the *Invitation to Submit Textbooks for Evaluation and Adoption in NC*
  – procedures publishers must follow
  – timeline for submission
  – criteria for selection
• The SBE (including its legal counsel) approves the Invitation and then it is distributed to Publishers through the NC Publisher’s Registry
Adoption Process (continued)

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

• Only companies on the NC Publisher’s Registry maintained by the State Superintendent can participate

• Publisher removed if “undue pressure” is exercised toward:
  – State Board of Education
  – Textbook Commission
  – Textbook Evaluation Advisors
  – NCDPI Staff
Undue Pressure

• “Undue pressure” defined as personal contact to advocate for the selection of a particular book or series of books

• Does not include social contact, presentations or written communication to the Commission for reconsideration or clarification
Standards of Conduct

- Demonstrate highest standards of personal conduct
- Avoid actual or perceived conflicts of interest
- Avoid solicitation or acceptance of any actual or promise of a favor or reward
Bid Submission Process
Requesting Bid Identification Numbers

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

- Identification numbers are alpha-numeric
  - Ex. ABP1100
- The character will be three letters designated by DPI from the Publisher’s/Company’s name
- The 1100 series of numbers will be the base number for all bids for mathematics resources
- The 3000 series of numbers will be the base number for all bids for Career and Technical Education (CTE)
Examples of Bid Identification Numbers

- Any Book Publisher requests 6 identification numbers for mathematics materials.

<table>
<thead>
<tr>
<th>Bid ID</th>
<th>Identification Numbers</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td>ABP1100</td>
</tr>
<tr>
<td>#2</td>
<td>ABP1101</td>
</tr>
<tr>
<td>#3</td>
<td>ABP1102</td>
</tr>
<tr>
<td>#4</td>
<td>ABP1103</td>
</tr>
<tr>
<td>#5</td>
<td>ABP1104</td>
</tr>
<tr>
<td>#6</td>
<td>ABP1105</td>
</tr>
</tbody>
</table>

DPI Assigned Identification Numbers for 6 bid submissions:

In this example ABP is created from the company’s name Any Book Publisher.
Examples of Bid Numbers

- Any Book Publisher initially requests 6 identification numbers for bid submissions. The company decides to add four (4) more submissions.

<table>
<thead>
<tr>
<th>Original Bid ID#'s requested</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABP1100</td>
</tr>
<tr>
<td>ABP1101</td>
</tr>
<tr>
<td>ABP1102</td>
</tr>
<tr>
<td>ABP1103</td>
</tr>
<tr>
<td>ABP1104</td>
</tr>
<tr>
<td>ABP1105</td>
</tr>
</tbody>
</table>

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

- ABP1105 + 1 = ABP1106
- ABP1106
- ABP1107
- ABP1108
- ABP1109
Examples of Bid Numbers

- Any Book Publisher initially requests 6 identification numbers for bid submissions. The company decides to add four (4) more submissions.

<table>
<thead>
<tr>
<th>Original Bid ID#’s requested</th>
<th>Additional ID#’s created after initial request</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABP1100</td>
<td>ABP1106</td>
</tr>
<tr>
<td>ABP1101</td>
<td>ABP1107</td>
</tr>
<tr>
<td>ABP1102</td>
<td>ABP1108</td>
</tr>
<tr>
<td>ABP1103</td>
<td>ABP1109</td>
</tr>
<tr>
<td>ABP1104</td>
<td></td>
</tr>
<tr>
<td>ABP1105</td>
<td></td>
</tr>
</tbody>
</table>
Examples of Bid Numbers

Any Book Publisher initially requests 6 identification numbers for bid submissions. The company decides to add four (4) more submissions.

Any Book Publisher now has a total of 10 bid identification numbers.

<table>
<thead>
<tr>
<th>Bid ID #1</th>
<th>ABP1100</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bid ID #2</td>
<td>ABP1101</td>
</tr>
<tr>
<td>Bid ID #3</td>
<td>ABP1102</td>
</tr>
<tr>
<td>Bid ID #4</td>
<td>ABP1103</td>
</tr>
<tr>
<td>Bid ID #5</td>
<td>ABP1104</td>
</tr>
<tr>
<td>Bid ID #6</td>
<td>ABP1105</td>
</tr>
<tr>
<td>Bid ID #7</td>
<td>ABP1106</td>
</tr>
<tr>
<td>Bid ID #8</td>
<td>ABP1107</td>
</tr>
<tr>
<td>Bid ID #9</td>
<td>ABP1108</td>
</tr>
<tr>
<td>Bid ID #10</td>
<td>ABP1109</td>
</tr>
</tbody>
</table>
Examples of Bid Identification Numbers

- Career First Company requests 4 identification numbers for CTE materials

<table>
<thead>
<tr>
<th>Bid ID #1</th>
<th>CFC3000</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bid ID #2</td>
<td>CFC3001</td>
</tr>
<tr>
<td>Bid ID #3</td>
<td>CFC3002</td>
</tr>
<tr>
<td>Bid ID #4</td>
<td>CFC3003</td>
</tr>
</tbody>
</table>

DPI Assigned Identification Numbers for 4 bid submissions:

In this example CFC is created from the company’s name Career First Company.
Purpose of the Spreadsheet

• The cost proposal spreadsheet will be used to enter bid information and prices for the textbook adoption process.

• Please save the spreadsheet with the following naming convention:
  ▪ Company Name_Cost Proposal_2020
  ▪ (example) AnyBookPublisher_Cost Proposal_2020
Submission Parameters

- Textbook materials may be submitted for any grade level/course the Publisher deems appropriate. Cost proposals must clearly state each grade level/course the Publisher deems appropriate.

- Publishers must clearly specify, the grade levels/courses for any submitted materials prior to submission.

- Textbook materials will only be evaluated for the grade levels/courses specified by the Publisher.

*Refer to pages 1 – 2 of the 2020 Invitation to see the submission parameters.*
Welcome to the North Carolina Cost Proposal Spreadsheet

In accordance to the directions below, publishers are to fill out the cost proposal spreadsheet. When you have completed the form, please save it with the naming style of *Company Name_Cost Proposal_2020* ex. AnyBookPublisher_Cost Proposal_2020.

Bid Submission

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

Enrichment Material Increments and Accompanying Student Material items

Enter a list of all bid materials with prices such as Student Edition, Teacher Edition, Digital Edition, and other support materials that will be provided at no additional cost based on the number of core bid materials purchased, such as accompanying student materials and teacher enrichment materials. Publishers may submit up to seven (7) items considered as Teacher Enrichment Materials and up to four (4) items considered as Accompanying Student Materials. Do not use dashes when entering the ISBN information. Example items are provided.
<table>
<thead>
<tr>
<th>Bid Number</th>
<th>Title</th>
<th>Grade Level or Course Title</th>
<th>ISBN</th>
<th>Publisher</th>
<th>Copyright</th>
<th>Edition</th>
<th>NIMAS Compliant Files?</th>
<th>Net Wholesale</th>
<th>NC Warehouse Allowance</th>
<th>Bid Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABP1100</td>
<td>Mathematics (5 year digital subscription)</td>
<td>NC Math 1</td>
<td>9785678912345</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td></td>
<td></td>
<td>$760.00</td>
<td>$60.80</td>
<td>$699.20</td>
</tr>
<tr>
<td></td>
<td>Mathematics Course Digital Student Edition</td>
<td>NC Math 1</td>
<td>9785678954321</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td>1</td>
<td>Yes</td>
<td>$55.00</td>
<td>$4.40</td>
<td>$50.60</td>
</tr>
<tr>
<td></td>
<td>Mathematics Course Digital Teacher Edition</td>
<td>NC Math 1</td>
<td>9787891234567</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td>1</td>
<td></td>
<td>$47.00</td>
<td>$3.76</td>
<td>$43.24</td>
</tr>
<tr>
<td></td>
<td>Mathematics Course Digital Resources</td>
<td>NC Math 1</td>
<td>9781234956789</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td>1</td>
<td></td>
<td>$35.00</td>
<td>$2.80</td>
<td>$32.20</td>
</tr>
<tr>
<td></td>
<td>Mathematics Course Digital Assessment Resource</td>
<td>NC Math 1</td>
<td>9781234987654</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td>1</td>
<td></td>
<td>$25.00</td>
<td>$2.00</td>
<td>$23.00</td>
</tr>
<tr>
<td>ABP1101</td>
<td>Mathematics</td>
<td>Precalculus</td>
<td>9781234545678</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td></td>
<td></td>
<td>$152.00</td>
<td>$12.16</td>
<td>$139.84</td>
</tr>
<tr>
<td></td>
<td>Mathematics Course Student Edition</td>
<td>Precalculus</td>
<td>9785678954321</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td>1</td>
<td>Yes</td>
<td>$55.00</td>
<td>$4.40</td>
<td>$50.60</td>
</tr>
<tr>
<td></td>
<td>Mathematics Course Teacher Edition</td>
<td>Precalculus</td>
<td>9787891234567</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td>1</td>
<td></td>
<td>$47.00</td>
<td>$3.76</td>
<td>$43.24</td>
</tr>
<tr>
<td></td>
<td>Mathematics Course Resources</td>
<td>Precalculus</td>
<td>9781234956789</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td>1</td>
<td></td>
<td>$35.00</td>
<td>$2.80</td>
<td>$32.20</td>
</tr>
<tr>
<td></td>
<td>Mathematics Course Assessments</td>
<td>Precalculus</td>
<td>9781234987654</td>
<td>Any Book Publisher</td>
<td>2020</td>
<td>1</td>
<td></td>
<td>$25.00</td>
<td>$2.00</td>
<td>$23.00</td>
</tr>
</tbody>
</table>
## Example – Accompanying Student Materials (ASM)

<table>
<thead>
<tr>
<th>Title</th>
<th>Grade Level or Course</th>
<th>ISBN</th>
<th>Ratio</th>
<th>Price for Additional Copies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mathematics ASM 1</td>
<td>NC Math 1</td>
<td>9781122334455</td>
<td>Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption</td>
<td>35.00</td>
</tr>
<tr>
<td>Mathematics ASM 2</td>
<td>NC Math 1</td>
<td>9782233445566</td>
<td>Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption</td>
<td>6.25</td>
</tr>
<tr>
<td>Mathematics ASM 3</td>
<td>NC Math 1</td>
<td>9783344556677</td>
<td>Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption</td>
<td>7.15</td>
</tr>
<tr>
<td>Mathematics ASM 4</td>
<td>NC Math 1</td>
<td>9784455667788</td>
<td>Upon request, choose up to 4 accompanying items for each Student Edition purchased, life of adoption</td>
<td>6.25</td>
</tr>
</tbody>
</table>
## Example – Enrichment Materials (EM)

<table>
<thead>
<tr>
<th>Title</th>
<th>Grade Level or Course</th>
<th>ISBN</th>
<th>Ratio</th>
<th>Price for Additional Copies</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mathematics EM 1</td>
<td>NC Math 1</td>
<td>9781912345678</td>
<td>Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions) upon request, initial year of purchase.</td>
<td>250.00</td>
</tr>
<tr>
<td>Chapter Resources</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mathematics EM 2</td>
<td>NC Math 1</td>
<td>9781923456789</td>
<td>Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions) upon request, initial year of purchase.</td>
<td>185.00</td>
</tr>
<tr>
<td>Mathematics EM 3</td>
<td>NC Math 1</td>
<td>9781934567891</td>
<td>Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions) upon request, initial year of purchase.</td>
<td>40.00</td>
</tr>
<tr>
<td>Mathematics EM 4</td>
<td>NC Math 1</td>
<td>9781956789123</td>
<td>Choose up to 7 enrichment items per classroom teacher (minimum purchase of 15 student editions) upon request, initial year of purchase.</td>
<td>40.00</td>
</tr>
</tbody>
</table>

Enrichment Materials (EM) Maximum 7 items
(See the 2206 Invitation for more specific details about ASM and EM.)
Sample Sites
Submission Parameters

• It is the responsibility of the Publisher to ensure that each submission is complete and correctly identified.

• Publishers shall ship sample textbook materials according to the schedule set by the North Carolina Department of Public Instruction. Sample textbook materials shall be shipped to sites designated by the North Carolina Department of Public Instruction.

• All shipped materials must contain the identification number that is supplied by the North Carolina Department of Public Instruction.

*Refer to pages 1 – 2 of the 2020 Invitation to see submission parameters.
Submission Parameters

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

*Refer to pages 1 – 2 of the 2020 Invitation to see the submission parameters.
Submission Parameters

Publishers submitting technology-based programs or other non-print materials must provide specific instructions on how to navigate all submitted digital materials through the 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. A video or screen cast is preferred.

A link for access to a video or screen cast instructions and/or an electronic document with navigation instructions must be submitted to nctextbooks@dpi.nc.gov 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 October 30, 2020. Contact information for technical support must be provided in the bid submission and during check-in with NCDPI staff at the evaluation site.

*Refer to pages 1 – 2 of the 2020 Invitation to see the submission parameters.*
Selected Sample Sites

- Publishers requesting identification numbers will also receive a list of selected sample sites.
- Bid submission samples are required for the Textbook Warehouse and Textbook Commissioners’ selected sample sites.
- Samples must not be delivered before June 1st and no later than June 5th.
Sample Sites

Selected sample site locations

- There will be at most 23 sites selected by the Textbook Commissioners as well as the Textbook Warehouse (official DPI sample site)
- Samples will arrive no earlier than June 1st and no later than June 5th
Evaluation Setup, Logistics and Removal of Materials
**Important Tentative Dates:**

**July 6th**
- Set up: 8 a.m. – 12 p.m.
- Presentations: optional (time - TBD)

**July 11th**
- Removal of materials and equipment: 2 p.m. – 4 p.m.

**Evaluation site:**
TBD
Submitting Questions

- Deadline for submitting written questions regarding the 2020 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina is **March 23, 2020 by 2:00 pm (EST)**.

- All questions must be written and submitted to mashonda.southerland@dpi.nc.gov by 2:00 pm (EST) March 23, 2020

- All questions will be answered and distributed to publishers
Textbook Adoption Web Page

https://www.dpi.nc.gov/districts-schools/district-operations/textbook-adoption

✓ Information about the 2020 Textbook Adoption Process

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

…and more…
Next Steps
Guidelines and Parameters

Read the entire 2020 Invitation

2020 Invitation to Submit Textbooks for Evaluation and Adoption in North Carolina

INSTRUCTION AND REQUIREMENTS

Submit Textbooks for Evaluation and Adoption in North Carolina

1. Each publisher shall submit a complete set of materials for each textbook, including sample textbooks, teacher's manuals, and any other materials required for evaluation.

2. Textbooks shall be evaluated based on the following criteria:
   a. Academic content
   b. Accessibility for all students
   c. Cost
   d. Compatibility with existing curriculum

3. Publishers shall submit all materials electronically through the online platform.


BID PROPOSAL INFORMATION

1. Submit a bid or proposal with the following information:
   a. Company name and contact information
   b. Textbook title, grade level, and subject
   c. Description of textbook
   d. Price

2. Submit a printed copy of the bid/proposal to the Department of Public Instruction.

DELIVERY INFORMATION

1. Submit materials to:
   a. North Carolina Department of Public Instruction
   b. Attention: Textbook Evaluation
   c. 301 N Wilmington Street
   d. Raleigh, NC 27601

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

Ensure others involved with the bid submission, samples, displays, etc. read all parameters and guidelines in the 2020 Invitation.
At no time during the adoption process may the Commission or any of its members meet privately with any publishers’ representatives.

- from the time the State Board approves the call Invitation
- until the State Board adopts the list of textbooks
Blackout Period
Sampling promotion

• No sampling or promotion of textbooks/programs under consideration for adoption by the Textbook Commission and State Board of Education shall be made
  – from the date the State Board approves and issues the 2020 Invitation
  – until the day after the Textbook Commission’s evaluation sessions with the Textbook Advisors.
Blackout Period
Sampling promotion

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

April 13, 2020 by 2 p.m.
Read the Entire 2020 Invitation and ensure others involved with the bid submission, samples, displays, etc. read all parameters and guidelines in the 2020 Invitation.
Read the Entire 2020 Invitation and ensure others involved with the bid submission, samples, displays, etc. read all parameters and guidelines in the 2020 Invitation.

Mathematics, 9-12

Career and Technical Education (CTE)
Closing
Contact Information

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Purchasing Agent
Financial and Business Services
mashonda.southerland@dpi.nc.gov