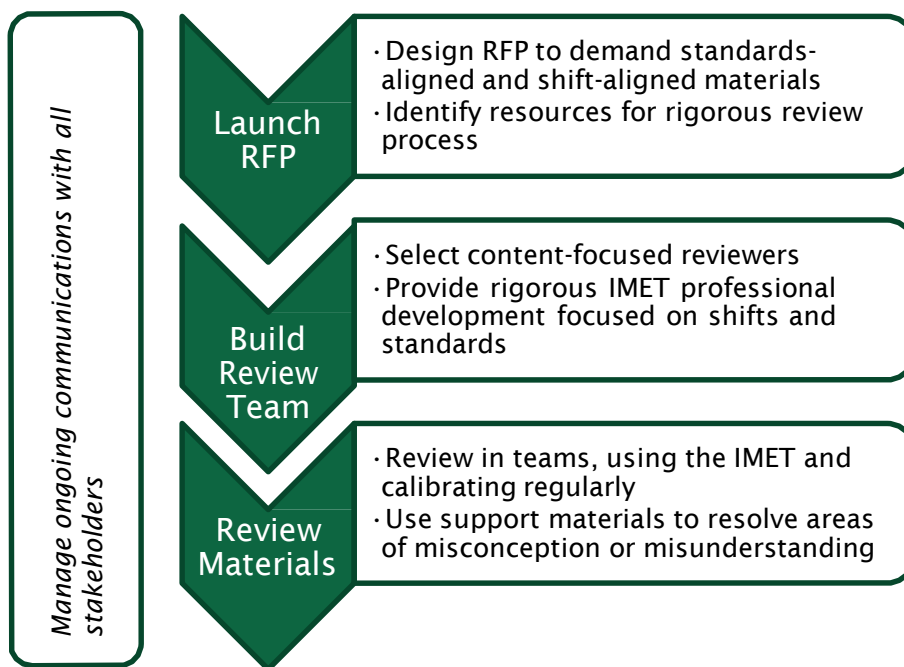


## Instructional Materials Evaluation Tool (IMET): Training Supports for District Leaders

Student Achievement Partners has created an array of supports for districts and states reviewing instructional materials to determine alignment to Common Core State Standards. [Here](#), users can find resources for deepening reviewers understanding of the shifts (section entitled “*Understanding the Shifts*”) and resources to train on the Instructional Materials Evaluation Tool (IMET) (section entitled “*The Shifts and Instructional Materials*”). Soon a set of supports will be available for districts to use during reviews to help reviewers with areas of common misunderstanding.

What follows in this document is a set of supports created specifically for leading the overall review process. First, users will find materials developed by the Council of Chief State School Officers’ (CCSSO) ELA and Math State Collaboratives on Assessment and Student Standards. These resources offer guidance for structuring reviews to make strong choices about instructional materials. Following the resources from CCSSO, are a sample timeline and a sample communications plan. Every document in the packet is meant as guidance, and to that end, users should be comfortable modifying each document in whatever way makes it most useful for the particular review at hand. These documents do not cover every aspect of a strong review but intend to be helpful to the educational leader guiding the review process and as a companion piece to the professional development modules, which give detailed support for content leaders in math and ELA.

The following diagram illustrates the high-level process for instructional materials review.



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*Authored by CCSSO ELA and Math State Collaboratives on Assessment and Student Standards*

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# Pathways to Purchasing Instructional Materials

*Authored by CCSSO ELA and Math State Collaboratives on Assessment and Student Standards*

## Introduction

The introduction of the Common Core State Standards (CCSS) and other college and career readiness (CCR) standards has pushed districts and states to find instructional materials that are aligned to them. Publishers and other organizations are creating materials that are labeled as CCSS- or CCR-aligned, but in truth, these materials vary greatly in their actual alignment.

To ensure that students benefit from standards meant to prepare them for college and careers of their choice, what follows are a set of tools, protocols, support, and guidance that represent the best thinking of curriculum leads from multiple states. They have focused on these four goals:

1. Assist you and other decision makers at the state level in making high quality choices of instructional materials that align with shifts present in the CCSS or other CCR standards.
2. Assist you in supporting districts in selecting aligned materials
3. Drive public outcomes of reviews to motivate publishers to improve existing materials.
4. Build the capacity of your educators to evaluate and improve the quality of instructional materials for use in their classrooms and schools.

The guidance offered below is intended to be useful in a wide variety of policy environments that range from state-adopted instructional materials to state-approved curriculum to complete local control by schools and individual teachers. Regardless of your context, it is designed to help you make strong choices about instructional materials (including the choice *not* to purchase because there are no materials of quality that fit your local conditions). Importantly, if states, districts, and schools across the country use these tools, the cumulative effect would be to create a unified voice about which products are aligned and strong and which are not. That would be enormously beneficial to districts and states that haven't yet engaged in a process to acquire materials—they could access these findings and learn from the reviews conducted.

But as noted above, our goals are more than just supporting alignment of materials—we believe that these findings could actually change materials for the better. The strengths and gaps within current vendor-produced materials reviewed can be made public; through these review processes, publishers could receive ongoing accurate and public feedback around their own work and around what districts and states are looking for in CCSS- or CCR-aligned materials. The feedback generated could also serve as a lever to motivate a broad swath of publishers to fill the identified gaps.

Lastly, a key element in this process is building local capacity for recognizing aligned materials, as that has highly beneficial side effects on instruction. Those jurisdictions choosing to adopt these tools and protocols will have a group of highly trained experts who are able to discern what quality looks like in instructional materials, as well as act as guides and as advocates for aligned materials.

In this packet, you will find supporting materials to help guide you in the process of selection of instructional materials (along with artifacts to support that work). These materials are grouped into three focus areas and should be consulted and used when undertaking an instructional materials review:

- Building an Effective Process for Evaluating Instructional Materials
- Developing a Rubric to Evaluate Instructional Material
- Delivering Effective Professional Development for Instructional Materials Reviewers

Note that there are some redundancies across the three sections because some users may only use one of the sections. All the documents are posted in Microsoft Word so that you can tailor them to fit your specific needs. Feel free to change them in ways that meet the needs of your stakeholders.

## **Building an Effective Process for Evaluating Instructional Materials**

While states and districts have been purchasing instructional materials for decades, the shift to the CCSS (and CCR standards more generally) necessitate some important changes to the process of evaluating and selecting materials. Based on the experience of well-respected educators from across 20 states, the guidance outlined below represents ideas and practices of curriculum leads from multiple states about the elements of effective processes for evaluating instructional materials. Knowing that each jurisdiction (state, district, or school) has its own interests, needs, and parameters for selecting materials, however, the guidance that follows should be modified and acted on within your context.

### **What to Consider Before Your Review:**

#### Legal

Align the review process to applicable state law, Board of Education policies, and local laws

Identify the strategy for a call for materials

- Clarify what you want
- Communicate with publishers around what you want
- Develop a clear approach, including process, tools, etc.
- Be specific about what materials, professional development, etc., the vendors will need to provide
- Determine parameters around bandwidth and other tech specs if applicable

Build in a specific, purposeful time to provide publishers' guidance at start of review (may be combination of RFP or other formal document along with webinar or other opportunity for publishers to ask questions, etc.)

Decide what will be done with the results post- review:

- Will the information be posted?
- Provided to publishers?
- Provided to teachers and principals?

Define an appeal process for vendors, if applicable

#### Budget/Timeline

Identify budget stream and time allocation for all participants in the review process

- Will reviewers be paid for their time?
- What size venue will you need for the training?
- Will reviewers need to work in person or will they be allowed to work virtually?
- Do you need to include evaluation of process in the budget?

Set timeline with benchmarks for each of the following:

- Developing the RFP
- Training reviewers
- Reviewing the selections
- Making final decisions

#### Communications

Communicate clear goal, purpose, and timeline to key stakeholders (politicians, board members, parents, community members (political and non), business leaders, union leaders, newspapers, teachers and principals, other relevant education leaders in the community, etc.) within district, within community, within review team, and across publishers

Publish/share expectations about process to all stakeholders

## General

Define the purpose(s) of review process

- Evaluate current materials
- Select new materials
- Select supplemental materials
- Define the medium of materials (print, digital) and if digital, determine technical specifications required. If digital, create an integrated approach between content team and IT team in order to ensure ongoing communications.

Build clear, sustainable quality assurance plan for review and for implementation

- Develop protocols for sharing outcomes with specific examples so a coherent understanding across reviewer bodies exist
- Develop an ongoing system to check your reviewer outcomes to make sure they are getting accurate results from their reviews, and if there are misconceptions about certain criteria, so you can address that misconception
- Determine whether there will be a third party evaluation of the review process; if so, identify evaluators.

Develop a common understanding of the process with the team of reviewers

Define a plan for rounds of review/gates that could save time:

- Will every product be fully reviewed?
- Will digital products be eliminated before review if they do not meet technical specifications? [*Beware the vendor who says that can be fixed, it will be ready by the end, etc.*]
- Will there be rounds of shorter reviews that only send final products through a full review?

Identify minimum number of reviewers

Define attributes of reviewer team (what expertise, what grade band, etc.)

Determine process for selecting reviewers, making sure to include key stakeholders (grade band teachers, special education experts, English Language Learner experts, etc.) as appropriate, paying attention to the requirements of the jurisdiction

Build a plan for compensation (money, credentials, time, etc.)

Define roles and responsibilities of all reviewers, including:

- Teachers
- Parents/community
- Other instructional leaders

Define a clear decision-making process

- Are reviewers' recommendations advisory or decisive?
- Do reviewers score and average their scores across a group, do they come to consensus, or do they bring in a third reviewer to make decisions when there is disagreement?
- What evidence should the decision maker use to make decisions?

Define a process for sharing information across reviewers and review teams. If the process is technological solution (i.e., not pen and paper), define technological needs and ensure the appropriate technology works

Clearly define parameters for outcomes and create reporting template:

- Can reviewers recommend multiple options?
- Can options include supplementals, etc.?

Determine how to use other information (EdReports, other state reviews, etc.):

- As a way to determine potential strong candidates?
- As a way to check review team accuracy in early stages?

Set expectations for reviews

- Where will they be done?
- What is the time frame for doing the work?
- How will reviewers be compensated?

Assess your professional development needs:

- Do you need space?
- Do you need trainers?
- Do you need summer?
- Do you need full year?
- Will the professional development need access to technology?

Assess the professional development capacity of vendor(s) (depending on rules within district or state) to see where they can match your needs, with a deep look into their ability to use sound pedagogy in their training process with teachers.

### **What to Consider During Your Review:**

#### General

Reinforce common understanding of what the purpose of the review is

Implement a clear, sustainable quality assurance plan for materials review

- Implement protocols for sharing outcomes with specific examples so a coherent understanding across reviewer bodies exist
- Check your reviewer outcomes to make sure they are getting accurate results from their reviews, and if there are misconceptions about certain criteria, so you can address that misconception. [Note that these supports will be available for access at a later date.]

Continue to communicate clear goals, purpose, and timeline across all stakeholders, including community, teachers, reviewers, publishers (for maintenance)

Build in systems to continually check for coherence and alignment across grades and across grade bands, especially if your structure has reviewers focused within a grade or grade band

Make sure there's a step after assessing alignment to the standards to consider other aspects of quality (topic alignment with social studies, teacher usability, culture, gender, etc.)

## **What to Consider After Your Review:**

### Communication

Be transparent about the process and the results

- With stakeholders
- With publishers

### General

Include in a project plan a clear implementation/roll out plan with support for teachers in classrooms about how to teach with the selected materials. This includes building buy-in among teachers and other stakeholders, post-adoption

- How will various stakeholders learn about the new materials?
  - What role do state/district leaders have?
  - What role does the publisher have?
- What does initial professional development look like?
  - Who will be invited?
  - How will it be turn-keyed to those not present?
  - How will the professional development orient users on the way the shifts are integrated into the materials and what implications that has for pedagogy?
- What is the plan for building instructional leaders across the state/district to support ongoing learning?
- How will online resources be used to support implementation and ongoing teacher learning?

Determine whether there will be a third party evaluation of the implementation; if so, identify evaluators



## Developing a Rubric to Evaluate Instructional Materials

*[Note that IMET users can download the training modules [here](#) (see “The Shifts and Instructional Materials Section”) and can skip this introduction and move to the checklist that follows.]*

Rather than starting from scratch, there are rubrics and protocols that you can use as your base and then customize as necessary. One of the most common base rubrics for evaluating a whole year or multiple years of materials has been the Instructional Materials Evaluation Tool (IMET), developed by the authors of the standards. Another commonly used tool, the Educators Evaluating the **Quality of Instructional Products** (EQuIP) rubric was designed for use by states, districts, and schools to review the alignment of individual lessons and units to the CCSS or another set of college and career readiness (CCR) standards.

The criteria below—derived from the IMET—concentrate on the most significant elements of the standards and lay out their implications for aligning materials with the standards. They are designed to help educators determine whether instructional materials are aligned to the key shifts and major features of the CCSS. At the heart of the CCS and CCR standards in ELA/Literacy are:

- **Complexity:** Regular practice with complex text and its academic language.
- **Evidence:** Reading, writing and speaking grounded in evidence from text, both literary and informational.
- **Knowledge:** Building knowledge through content-rich non-fiction.

In mathematics, they are:

- **Focus** strongly where the standards focus (see Table 1 of the Publishers’ Criteria).
- **Coherence:** Think across grades and link to major topics within the grade.
- **Rigor:** In major topics, pursue conceptual understanding, procedural skill and fluency, and application with equal intensity.

Several states and districts have decided to use the IMET in its full form. Others have shortened it or made other modifications to reflect their state or local mandates or preferences. Still others have infused key elements from the IMET to update their pre-CCSS or CCR rubrics. Though it is critical for the non-negotiables contained within the IMET to remain intact to assure materials evaluated are in fact aligned, you have the choice to use the IMET in its entirety or as your base and then customize a rubric to meet your particular needs.

### Before Your Review:

Make sure the rubric includes all state-specific mandates. Add criteria to meet the mandates  
Make sure the rubric has the sign off of the individuals and entities that need to approve  
Include specific scoring criteria and appropriate weights of categories  
Modify the rubric to suit your context, though be sure to preserve the essence of standards’ alignment criteria. Here is a direct link to a state that has modified the IMET:  
<https://www.louisianabelieves.com/academics/instructional-materials-review/curricular-resources-annotated-reviews>

Know that not all metrics need to be reviewed with equal intensity. If time is an issue, give deeper considerations to maintaining the criteria that represent the key instructional shifts. In ELA/literacy, this includes all the metrics that accompany non-negotiables:

- High-quality text (NN1)
- Evidence-based discussion and writing (NN2)
- Building knowledge (NN3)

In mathematics, this includes NN Metric 1A, as well as:

- Focus on the content emphasized in the Standards (NN2 Metric 2A, 2C, 2D, 2F)
- Coherence within and across grades (NN2 Metric 2B, 2E)
- Ensuring a balance of conceptual understanding, procedural skill/fluency, and applications (AC Metric 1A, 1B, 1C)

The priority metrics are bolded on the IMET for ease of use.

Make sure there's a step after assessing alignment to the standards to consider other aspects of quality (topic alignment with social studies, teacher usability, an unbiased approach to culture and gender, etc.)

### **During Your Review:**

Decide whether you will be reviewing just the main materials or supplementals too. Consider what percentage of the selection must be reviewed to be defensible (the IMET has guidance, e.g., one-quarter of the units...)  
Accurately represent the sample set reviewed when rating each metric (e.g., "We looked at 8 of the 30 stories or lessons offered."; "We reviewed one in every four sets of questions and tasks.") Be cautious of generalizations when citing evidence. Document evidence and detail so other reviewers or the public can quickly check the ratings and publishers can learn from the review:

- Quantify the results where you can.
- Provide specific examples with page citations.
- Don't make a conclusion without supporting evidence.

### **After Your Review:**

Share reviews with publishers, including guidance about where their materials were strong and weak.

## **Delivering Effective Professional Development for Instructional Materials Reviewers**

Launching the review and potential purchase of new instructional materials is a big investment—often the biggest materials expenditure a district has—and our current environment has made it harder than ever to ensure strong outcomes. The most important step that a review team can take may be to choose and train reviewers well before digging into the process. That means investing significant time and resources into making sure you've brought the strongest set of practitioners into the review process and that you've given them time to learn the rubric and to practice on that rubric. Reviewers need plenty of time to examine examples and non-examples of aligned materials, as well as time to calibrate across the team so that when they begin the actual review process, they are in accord in their understanding and ability to identify aligned materials. While this is a significant investment on the part of the state or district and should not be minimized, it is an investment that pays off well beyond the review process. Those who serve on the review committee will deepen their own understanding of the standards and shifts and will be able to support strong implementation down the road.

### **Select Your Review Team**

Develop defined criteria for selection of reviewers that aims at getting the strongest members possible. Consider:

- Asking for sample review of materials OR sample submission of materials that are aligned to standards
- Creating a competitive process that ensures strong candidates

Build a recruitment plan that ensures strong content knowledge, by grade band, within the reviewing team

When the team membership is defined by policy (e.g., requiring a certain number of parents and/or business community members) or availability of knowledgeable teachers is limited, do what is possible to infuse talent

Consider identifying expert reviewers to lead the team reviews

### **Plan Your Professional Development**

Develop protocols for reviewing curriculum before planning the reviewer training and ensure that those details are integrated into the training process. This includes developing protocols related to scoring and decision-making (e.g., How many people need to review a specific resource? Will differences be decided by consensus, taking an average of scores or by a third person? How will decisions be made when there are disagreements?)

Build time in the agenda to train on the scoring tool itself, be it the IMET, EQulP rubric or a locally developed or adapted tool

Consider creating a straw man, a mock review, for people to use as practice

## **Prepare for Your Professional Development**

Prior to the training day for curriculum selection, provide professional development on the CCSS and the key instructional shifts to build a common lens. [Professional development modules that guide you through the ELA and math review are available [here](#).]

- For ELA, be sure to include academic vocabulary, analysis of text complexity (quantitative and qualitative measures), and the qualities of text-based questions.
- For mathematics, be sure to include the major work of the grade, a familiarity with the progressions upon which the Standards were built, and understanding rigor in the context of the Standards.

Consider organizing by grade bands K-2, 3-5, 6-8, and high school.

Consider making time to introduce the review tool, time to practice with the tool, and time to calibrate across the group based on results.

Walk through the review tool with reviewers—to come to agreement around the evidence needed to support the criteria and any terms that need additional clarification

Provide an annotated trainers' version of the review tool

Discuss strong and weak examples of evidence for each of the criteria

## **Implement Professional Development**

Make sure the intentions of the process is very transparent and clearly laid out to all the reviewers (e.g., Will this lead to a state or district adoption? Will this lead to a list of state approved materials? Will this lead to a purchase?)

Emphasize importance of going back to the criteria in the review tool to make sure the evidence meets the criteria

Emphasize importance of being purposeful about what you are reviewing

## Sample Timeline

Note that this timeline is a sample and is very high level (i.e., lots of interim steps have been omitted). Districts will have various different steps to add and steps they might delete.

STEP	TIMELINE	PERSON RESPONSIBLE	NOTES
Identify a need and an associated funding stream			
Identify parameters for that need as set by district (grades, funding, etc.) and release an RFP that effectively articulates goals, parameters, and qualities of instructional materials			
Identify resources for selection process, including time, space, and funding for reviews of materials			
Select and train a strong group of reviewers, considering representation of critical stakeholders in decision-making process			
Build decision-making process that ensures multiple layers of feedback and approval and ends with senior leadership			
Develop list of products to review based on response to RFP and build review schedule			
Train reviewers on the tool (IMET) and offer significant norming opportunities on sample materials to ensure consistency across reviewers			
Review instructional materials to identify which go on to next round			
Second round reviews of instructional materials			
Discussion with final vendors			
Final round of reviews of instructional materials			
Presentation to senior leadership			
Negotiation			
Purchase			
Delivery plan			
Implementation plan, including professional development			
Communications plan including all stakeholders			

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## Sample Communications Plan

This communication plan is merely a sample of what a district or state might create in order to think through key communications to integral stakeholders across the community.

What is the message?	Why do I need to communicate?	Who do I need to communicate with?	What could go wrong?	Follow Up?
The CCSS and shifts are about equity and about getting our kids prepared for college.	lots of misinformation about the standards and what their purpose is	Parents; teachers; union	suspicion that these are about disenfranchising kids, about assessment, about teacher evaluation	
The materials are different from curriculum and different from pedagogy.		Parents; teachers; union		
Teachers are learning and we need to build in time and space for that learning. Just like you want your doctor to be abreast of the newest research, you want that from your teachers.	Learning this new paradigm is gradual and challenging. The fact that it's happening at the same time as teacher evaluation makes it more challenging and everything we can do to create space for teachers to learn is critical.	Parents; teachers; union; principals		
Roll out of new materials needs to be carefully planned so that teachers, parents, and students can have positive challenges.	Selecting the material is just the first step of the journey; if you don't want the materials to end up in a closet, you have to think about roll out.	teachers, principals, administrators, operational folks		
Standards are not assessment; the pushback around assessment may or may not be appropriate from your perspective but it should be kept separate from the standards.				

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**Sample Communications Plan (continued)**

<b>What is the message?</b>	<b>Why do I need to communicate?</b>	<b>Who do I need to communicate with?</b>	<b>What could go wrong?</b>	<b>Follow Up?</b>
Fidelity is important but instructional materials are not a script. Fidelity can only be achieved if you understand what is important about the new materials and where the shifts live within those materials.				
The status quo process cannot continue.	Many people won't necessarily understand why the old way can't continue.	administration; procurement offices; teachers; parents		
Transparency of the process so that everyone knows how decisions were made.	There can be suspicions about why we're doing this, who chose, how they got picked, etc.	teachers, parents, principals		
These materials are not perfect; they will have strengths and weaknesses.	Don't want everyone seeing these as a bible.	teachers, parents, principals, community		
At the end of the day, this is about student learning, and everything else should be anchored in that student learning. Teachers' expertise is critical to implementing it.				
Students can do this.	Teachers have genuine struggles implementing the less rigorous materials and are feeling paralyzed about implementing something harder.	teachers, parents, principals		