



**SELECTING FOR QUALITY:**  
**A GUIDE FOR ADOPTING HIGH-QUALITY**  
**INSTRUCTIONAL MATERIALS**

# SELECTING FOR QUALITY: A GUIDE FOR ADOPTING HIGH-QUALITY INSTRUCTIONAL MATERIALS

## Adoption Process Overview

### 1. **Develop Your Local Lens**

Gather data, establish a committee, develop your vision, and set priorities to ensure a successful adoption.

### 2. **Know and Winnow Your Choices**

Understand the market and identify a subset of programs that can be deeply investigated for alignment and your other local criteria.

### 3. **Investigate the Materials**

Engage in a hands-on study of the 2-4 products you have identified to better understand the materials before making a decision.

### 4. **Make Your Decision**

Work with the committee to analyze evidence collected during hands-on study and make a final selection that meets your local priorities.

### 5. **Launch and Implement**

Plan how you will prepare teachers and leaders to implement the materials and assess the progress of implementation.

# 1

## Develop Your Local Lens

Identify your team, understand your context, and define your parameters.

### What Happens:

In this phase, you will lay the groundwork for an informed and collaborative process by defining what success looks like, reviewing district priorities, and building a team.

### Using the following worksheet, you'll answer these questions:

- What does your data tell you about the need for new materials?
- What is your instructional vision for the district?
- Who is on your adoption committee?
- Who are your stakeholders? How will you keep them informed throughout the process?
- What is your timeline for selecting?
- What is your project scope in terms of time, resources, and budget?
- What guidelines or requirements do you have?

### Why this step matters:

There are a few reasons why this step and the activities within it are essential to the success of your adoption. By reviewing district priorities, data and instructional vision, you're grounding your work in what's most important to your community. Bringing together a collaborative team will build support for your work and ensure diverse perspectives inform your decisions. At its best, a successful adoption process focuses on the specific needs of the local community, including students and teachers.

## Develop Your Lens: 1. Establish a Committee

Before diving into the data, consider your team, context, and parameters for instructional materials adoption.

### 1.1 Who is on your adoption committee and what are their roles?

Name	Roles

#### Norms

1.

2.

3.

# Develop Your Lens: 2. Parameters and Guidelines

## 1.2a What are your parameters?

<b>Size of Work (number of grades, schools, districts, counties)</b>	
<b>Content Area and Grade Level</b>	
<b>Technology Needs</b>	
<b>Description of Student Population</b>	

## 1.2b What guidelines or requirements do you have specific to instructional materials?

<b>State</b>	
<b>District</b>	
<b>School</b>	

## Develop Your Lens: 3. Gathering Your Data

Spend a short amount of time collecting, reviewing, and analyzing the following key data sources.

### 1.3a Materials in Use

What are teachers using in classrooms for the target grades? Does that differ from district/school expectations?

### 1.3b Assessments (formative, summative, statewide, etc.)

Examples of Formative: journal entries, student self-assessments, writing samples, student work, and “exit tickets.”

Examples of Summative: common benchmark assessments, end of unit exam, and state assessments.

What data do you have?	
What other data do you need?	

## Develop Your Lens: 3. Gathering Your Data (cont.)

### 1.3c Classroom Observation Data

<b>What data do you have?</b>	
<b>What data do you need?</b>	

### 1.3d District/School Initiatives

<b>What initiatives are in place that you must address or could impact the adoption decision?</b>	
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### 1.3e Stakeholder Perceptions

<b>What data do you have from others regarding new materials?</b>	
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## Develop Your Lens: 3. Gathering Your Data *(cont.)*

### 1.3f Additional Data

What other information is important to know?	
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# Develop Your Lens: 4. Data Interpretation

1.4a Use this worksheet to make observations and inferences about the data you've collected. Synthesize these into larger themes to guide your implementation work.

## Data Sources Examined:

- 1.
- 2.
- 3.
- 4.

<b>Observations</b> <i>Look at your data and pull out FACTS</i>	<b>Inferences</b> <i>Look at your observations and pull out the MEANING</i>
<b>Examples:</b> <ol style="list-style-type: none"><li>1. ELA test scores for most students are higher in 4th and 5th grade than in 6th grade.</li><li>2. English Learners' ELA scores flatline from 4th to 7th grade.</li><li>3. In youth surveys, students report feeling disconnected from school in 6th grade.</li></ol>	<b>Examples:</b> <ol style="list-style-type: none"><li>1. English Learners are not being well served in upper elementary and middle school.</li><li>2. Students are not being well served in the transition between elementary and middle school. Lack of communication between elementary and middle schools (and between 5th and 6th grade teachers) may not be in place to support students.</li></ol>
1.  2.  3.  4.  5.	What are we doing well?  Who isn't learning? What aren't they learning?  Who is being served? Who isn't being served?  What in our curriculum, practice, or policies could be causing that? What are we seeing in classrooms and/or student work to corroborate this?

## Develop Your Lens: 4. Data Interpretation (cont.)

### 1.4b Implications

Look at your inferences and brainstorm potential **CONCLUSIONS**

#### Examples

1. The school needs to spend more time and resources on the transition between 5th and 6th grade.
2. The district needs to consider how to support English Learners in upper elementary grades better.

What are the implications of the data for your materials adoption?

Based on your implications, do you still have outstanding questions? What are they? Do you need to collect more data? What is it?

## Develop Your Lens: 4. Data Interpretation (cont.)

### 1.4c Analyze your past instructional materials adoption and your current instructional materials implementation

What successes and challenges did your system experience while making the last adoption decision?

How did you determine your selection criteria and who participated in selection? How did professional learning impact your decision?

What expectations were set for standards-based curriculum practices and/or instructional materials usage for successful outcomes?

What is the feedback from teachers, students, and parents regarding our current materials?

How did formative and summative assessments in use in your districts influence the adoption?

How well did the instructional materials support improved student outcomes in your district?

## Develop Your Lens: 5. Adoption Goals and Criteria

**1.5a What are your goals for this materials adoption? What are you hoping to accomplish by selecting a new set of instructional materials?**

- 1.
- 2.
- 3.

**1.5b What is the content-focused instructional vision that will drive all decision-making in this adoption?**

**1.5c What is your theory of change statement for your adoption? Why do you need new materials?**

## Develop Your Lens: 5. Adoption Goals and Criteria *(cont.)*

### 1.5d Define your quality criteria and establish priorities for the materials.

Using your instructional vision, any state or district definitions of quality and the EdReports' guidance, define what "high-quality" instructional materials mean for your system,

List the 3-4 priorities you've established for this adoption (i.e., materials must have supports for students learning English). We recommend the number one priority is that the materials are aligned to college and career-ready standards and instructional shifts.

## Develop Your Lens: 6. Educator Engagement Plan

Bringing educators, those that will be most closely affected by the new materials, into the conversation early and often is highly encouraged.

### 1.6 Teachers should play a part as members of the adoption committee as well but what about those who are not on the committee? How will you bring other teachers along in this process?

Which teacher leaders can we engage to influence a wider teacher audience? Do we need to engage only general education classroom teachers, or should we also include special educators, assistant teachers, or others? (list names of teacher leaders here).

What will teachers be worried about and how can we proactively address their concerns? (list any concerns you think they will have and possible ways of addressing).

How will feedback be collected on our instructional vision and from whom? (list specific ideas)

What is the first thing we plan to do to engage those that are not part of this committee? (list specific actions and who will be responsible)

## Develop Your Lens: 6. Educator Engagement Plan (cont.)

### 1.6 Teacher Members of Adoption Committee (cont.)

What are some ways we can begin to collect information and feedback from teachers and leaders that will help make our decision about the materials?

## Develop Your Lens: 7. Decision-Making Approach

**1.7 Before your committee embarks on the difficult job of selecting the right materials for your district, ensure everyone knows how your team will make the adoption decision. Record how your committee will be making its final decision and any questions or needs you have to move forward with this approach.**

<p><b>Decision-Making Approach (i.e., consensus, single person, vote).</b></p>	
<p><b>What questions or needs are there to think about during this process? What will ensure you are ready to make a decision when the time is right?</b></p>	

# Develop Your Lens: 8. Roles and Responsibilities

**1.8 Carefully consider who will be responsible for the activities that must happen during the adoption process.**

Name	Role(s)  Including: Data collection, desk research, procuring samples, logistics coordinator, etc.	Responsibilities  Set expectations for each team member, so everyone understands their roles and responsibilities.

## Develop Your Lens: 9. Timeline

**1.9 Create a timeline for your adoption by brainstorming 2-3 key activities that will occur each month. What will you accomplish in each month?**

*Key activities include: Data collection, staff training, studying the materials, professional learning, etc.*

<b>November</b> 1. 2. 3.	<b>December</b> 1. 2. 3.	<b>January</b> 1. 2. 3.
<b>February</b> 1. 2. 3.	<b>March</b> 1. 2. 3.	<b>April</b> 1. 2. 3.
<b>May</b> 1. 2. 3.	<b>June</b> 1. 2. 3.	<b>July</b> 1. 2. 3.
<b>August</b> 1. 2. 3.	<b>September</b> 1. 2. 3.	<b>October</b> 1. 2. 3.

# 2

## Know and Winnow Your Choices

Research materials available on the market, create a list of potential materials that fit your local criteria and priorities.

### What Happens:

**In this phase you will understand what materials are available in the market. From that research, you will develop a short list of programs that you will investigate deeply for alignment and other local criteria.**

**Using the following workbook, you'll answer these questions:**

- What is the market landscape for your district's content/grade-level focus?
- Using the EdReports Compare feature, search by content area and grade-level, how well do the materials available meet expectations for alignment? What about for usability?
- What other quality characteristics are found in the materials you are considering?
- What do other reviews or other districts using those materials say about them?
- What programs are closely aligned with your instructional vision?

### Why this step matters:

This step gives you the opportunity to review all that is available in the market for your adoption. The materials market is extensive, using EdReports reviews will give you a chance to focus on materials that meet or partially meets expectations for standards alignment.

During this time you will use the work in Step 1 to make the most of your materials research, ensuring you are choosing materials that will support your instructional vision. Using the reports and compare feature on EdReports will allow you to create a short sublist of 2 - 4 programs to investigate more deeply for local priority alignment.

## Winnow Your Choices: 1. The Market

**2.1** Go to [EdReports.org](http://EdReports.org) and learn about the variety of materials that are available for the content area and grade-level you are selecting.

Program Title	Grade-levels Available	Alignment (meets/partially meets, does not meet)
<b>ELA Example:</b> <i>Best Reading Book Ever!</i>	K-2, 3-5 (no 6-8)	Partially meets expectations

## Winnow Your Choices: 2. Desk Research

**2.2** Desk research means the kind of research you can do from your desk (i.e., phone calls, internet searches, email, etc.)

Part of the research includes using the EdReports compare tool to look more deeply at the alignment to standards and shifts. Watch this video to get a better idea. <http://bit.ly/ERcompare>

Program Title	Research Information
<b>ELA Example:</b> <i>Best Reading Book Ever!</i>	Partially meets expectations for alignment to the standards, traditional basal program, low scores in writing program, some supports for English Learners.

## Winnow Your Choices: 3. Winnowed List

**2.3 Based on the information collected in your desk research and the priorities you've established for your adoption, what are the 2-4 programs you'd like to investigate more deeply?**

Program Title

# 3

## Investigate the Materials

Establish the structure for your second phase of research and collect evidence.

### What Happens:

**In this phase you will spend time studying the 2-4 products you've narrowed down and establish an evidence collection tool to support you in making your decision.**

**Using the following worksheets, you'll answer these questions:**

- How will you collect evidence during this investigation?
- What questions do you have for publishers of each material? How will you discuss gaps or concerns?
- When will you hold publisher presentations and who will attend?
- How will you keep your stakeholders informed throughout the investigation process?
- Will you hold a pilot or field test? What is the purpose and how will you use it to inform your decision?

### Why this step matters:

The selection of materials has long-ranging effect on a variety of instructional initiatives and decisions, including assessment and professional learning. These materials also impact how parents interact with their students and how teachers spend their time preparing.

For these reasons alone, the committee will need to take time to study the options very carefully and apply the priorities they've established to each option. Ensuring that the decision is made using evidence and is guided by your instructional vision for the content.

## Investigate the Materials: 1. What do you want to learn?

**3.1a** Before this next phase of the investigation, discuss with your committee what it is you still need to learn about the materials and plan for how you will do that.

What do you want/ need to learn about the materials?	
What's the best way to do this (e.g., book study, field test, PLC unpacking, other)? Why is this the best way?	
How will this structure impact your decision-making approach?	

**3.1b** Develop an evidence collection process and the tools to use during your study, this critical step cannot be overlooked. When your committee and other stakeholders are studying the materials, you must provide guidance for the evidence they are collecting.

Will the evidence be used to inform the decision?	
Will the evidence be used to inform future professional learning?	
How will you gather feedback from additional stakeholders (students, parents, community orgs., other teachers)?	

### 3.1b Evidence Collection Process (Cont.)

<b>Will the committee collect one type of evidence and other stakeholders another? If so, what will that be?</b>	
<b>What evidence is most important to collect from educators in the field? (this is specific to your priorities)</b>	
<b>Based on the previous question, how will the committee track the evidence that is being collected? (Google docs, forms, surveys)</b>	
<b>Will those participating in the study need additional professional learning to prepare them? If so, what do they need to know and how will they learn it?</b>	
<b>What is the timeline for your study? When will you start? How long will you run it?</b>	
<b>Who is responsible for leading the study? Who will develop the evidence collection tool/s? How will everyone have access?</b>	
<b>Link to your evidence collection tool/rubric here</b>	

# Investigate the Materials: 1. What do you want to learn? (cont.)

## 3.1c Examples of investigations: Book Study

<p><b>What is the purpose and what do you hope to learn from the book study (e.g., teacher perspectives of the program elements, teacher perspectives of the ease of planning, content experts perspectives of the pacing)?</b></p>	
<p><b>Sample structure:</b> <i>Each week decide what parts of the program you'll examine. Then prepare and try sample lessons from the materials with one another.</i></p>	<p><b>Notes:</b></p>

## Examples of investigations: Pilot/Field Test

<p><b>What is the purpose and what do you hope to learn from the pilot (e.g. evidence collected will inform future professional learning, student reaction to the types of questions asked, teacher perceptions of ease of planning or protocols)?</b></p>	
<p><b>Sample Structure:</b> <i>Test routines and sample activities from the materials in classrooms.</i></p> <ul style="list-style-type: none"><li><i>Plan for the pilots with the student experience in mind. Ensure the learning objectives and scope fit within the overall academic year so that standards and skills are not inadvertently missed.</i></li><li><i>Plan for each piloting teacher to look at all of the options the committee is considering.</i></li></ul> <p><b>See EdReports' recommendations <a href="#">HERE</a>.</b></p>	

## Investigate the Materials: 2. Publisher Engagement

Now is the time to reach out to publishers to get samples of the materials and set up future presentations. The publisher presentation is an opportunity for the committee to get answers to specific questions about your local priorities as well as to discuss strengths and gaps identified in the reports.

### 3.2a Below is a recommended series of steps to prepare for engaging with publishers.

1. Develop a list of questions based on your priority areas and non-EdR reviewed areas to ask the publishers how those are incorporated into the materials - e.g., "one of our district priorities is providing supports to ELs. How do your materials support students at varying levels of language acquisition in accessing the content?"
2. Send the questions to the publishers in advance.
3. Develop a note-taking sheet or the like to capture their answers to the questions and your assessment of how well the materials meet your needs based on these answers.
4. Debrief as a team after the publisher presentations to determine which smaller subset to pilot/PLC.

### 3.2b What are the questions you have for publishers that will help winnow your list further and get closer to making a decision?

Note: Read here how several districts engaged publishers in a very specific manner. <http://bit.ly/31MilzJ>

Program Title	Questions
<b>ELA Example:</b> <i>Really Rad Readers</i>	<ol style="list-style-type: none"><li>1. How do the materials address students who are learning English?</li><li>2. What are the texts available that provide "windows and mirrors" for ALL students?</li><li>3. Do you provide materials in multiple languages?</li></ol>

# 4

## Make a Decision

Work with your committee to analyze the evidence collected during the study and make a final selection.

### What Happens:

**In this phase you will gather the evidence collected in Step 3 and, with your committee, make a final decision.**

**Using the following workbook, you'll answer these questions:**

- Which of these products supports our vision of instruction?
- What work do the materials require of us? Is this work we CAN do? Is this work we WANT to do?
- Which product aligns with our overall instructional goals and initiatives?
- How will you engage in the decision-making process? Who will lead the consensus (or other) activities?
- What is your timeline for procuring the materials?
- How will you communicate the decision?

### Why this step matters:

While this step may seem like the last detail in the extensive process your committee has been engaged in, this is just the beginning of your work toward strengthening instruction and ensuring all students have access to high-quality instructional materials.

## Make a Decision: 1. Prepare for Decision-making

4.1a Carefully consider each program's pros and cons and record them here. Use your desk research and evidence collection to help you fill in the tables on each program.

Program #1	Plus	Delta	Required Work
Standards Alignment			
Priority #1			
Priority #2			
Priority #3			

Program #2	Plus	Delta	Required Work
Standards Alignment			
Priority #1			
Priority #2			
Priority #3			

## Make a Decision: 1. Prepare for Decision-making (cont.)

### 4.1a Program's Pros and Cons (cont.)

Program #3	Plus	Delta	Required Work
Standards Alignment			
Priority #1			
Priority #2			
Priority #3			

### 4.1B Action Steps

### Notes

#### 1. Prepare for the decision-making process

- A. What do you need to do to prepare for your committee to come to consensus, vote, or gather evidence?
- B. Will this be a face to face meeting? Who will attend? Will it be a full day meeting?
- C. How will you capture the ideas, questions and comments from this meeting?

## Make a Decision: 1. Prepare for Decision-making (cont.)

4.1B Action Steps (cont.)	Notes
<p><b>2. Prepare for the decision-making process</b></p> <p>A. What data do you have that will inform your decision?</p> <p>B. What data do you still need to collect to inform this decision?</p> <p>C. How do you plan to compile and share the data so that the entire committee can see and use it?</p> <p>D. How will the data be stored so that it can be used in planning for professional learning?</p>	
<p><b>3. Discuss and Cite Evidence</b></p>	
<p><b>4. Work toward consensus OR Share evidence with decision-maker OR Prepare for voting</b></p>	
<p><b>5. Assess how well the materials support your instructional vision.</b></p>	
<p><b>6. Make the decision.</b></p>	

## Making a Decision: 2. Communications Plan

You will need to be ready to communicate your decision and process to stakeholders. Think about all of your stakeholders, what will each group need, and how will you communicate it to them?

### 4.2 Answer the following questions for each group of stakeholders you will need to communicate your decision to about your adoption process.

Who are your stakeholders that will want to know your decision and decision-making process? Name each group and then answer the questions below making sure to think about all stakeholders involved.

What will your stakeholders want to know about your selection process and decision? What will increase stakeholder buy-in in the selected materials?

How can we proactively communicate this information in a way that engages stakeholders? Email? Presentation? Video Recording?

Who will deliver the message to stakeholders and when?

## Making a Decision: 2. Communications Plan *(cont.)*

### 4.2 Stakeholder Communication *(cont.)*

What questions do we expect to get and what is our plan for addressing common questions?

## Making a Decision: 3. Procurement Plan

### 4.3 Answer the following questions and determine your procurement process and timeline.

Who is your point person for procurement?

Who is responsible and what are the timelines for all involved? What is the date you hope to have materials in the hands of educators?

How will you track the materials? How will you communicate with educators about the expected timeline for delivery of the materials?

# 5

## Plan for Launch and Implementation

Plan how you will prepare teachers and leaders to implement the materials and assess the progress of implementation.

### What Happens:

In this phase you will plan for the rollout and implementation of your new materials.

Using the following worksheet, you'll answer these questions:

- What are the desired outcomes for the launch and year 1 of implementation?
- How do these relate to your vision of instruction and the goals of the adoption?
- What are the key activities that must occur for you to reach your goals?
- How you will capture data from the launch to inform your implementation plan?
- What do you want to communicate about the expectations of use of the new materials?
- How will you monitor the implementation?
- Who will provide feedback and how will you collect that?

### Why this step matters:

Thinking about how you will launch and implement your new materials is part of your adoption process from Step 1. But now that you've made a decision, it's time to establish a plan for how the materials will be launched and implemented in your system.

Planning ahead, empowering educators, engaging stakeholders, and connecting strong professional learning throughout the launch process can be the difference between materials sitting on a shelf or becoming a high-leverage tool your educators have to improve student learning.

# Plan for Launch and Implementation: 1. Goals

## 5.1 Determine the goals for the implementation of the new materials, include the expectations for use. What are some realistic outcomes and what is your timeframe?

<p><b>What are your goals for each phase of the implementation of the new materials?</b></p> <ol style="list-style-type: none"><li>1. Launch (include “getting to know” the materials)</li><li>2. Implementation year 1</li><li>3. Implementation years 2-5</li></ol>	<p>Phase 1: Launch</p> <p>Phase 2: Implementation Year 1</p> <p>Phase 3: Implementation Year 2-5</p>
<p><b>What are the expectations of use for the new materials?</b></p>	
<p><b>How will you address questions, feedback, and/or resistance to the expectations?</b></p>	

## Plan for Launch and Implementation: 2. Activities and Metrics

**5.2a What key activities must occur for you to achieve your goals for instructional materials in each phase, short term, and long term? Consider the professional learning needed for those leading the implementation as well as how teachers will learn to teach these specific materials.**

<p><b>Phase 1: Launch</b> (example)</p> <ul style="list-style-type: none"> <li>• professional learning for staff and leaders responsible for training others</li> <li>• training plan for all teachers (e.g. “getting to know” the materials)</li> <li>• learn what training is available from the publisher</li> </ul>	<p>Key Activities:</p>
<p><b>Phase 2: Implementation Y1</b> (example)</p> <ul style="list-style-type: none"> <li>• professional learning to support teachers in learning the new materials (protocols and planning)</li> <li>• establish who needs to be trained on the materials other than teachers</li> </ul>	<p>Key Activities:</p>
<p><b>Phase 3: Implementation Y2-5</b> (example)</p> <ul style="list-style-type: none"> <li>• sustained PL to ensure teachers know how to make adjustments to the new materials</li> <li>• onboarding for new teachers and principals</li> </ul>	<p>Key Activities:</p>

**Link your professional learning plans here.**

# Plan for Launch and Implementation: 2. Activities and Metrics (cont.)

**5.2b Establish the metrics you will use to assess the success of the launch and implementation. What data will you collect to inform you of the progress of your plans?**

<b>Phase 1: Launch</b>	
<b>Phase 2: Implementation Y1</b>	
<b>Phase 3: Implementation Y2-5</b>	

## Plan for Launch and Implementation: 3. Communications and Feedback

**5.3 Plan for communication and feedback mechanisms for parents, teachers, and other stakeholders so that you are responsive to their needs and concerns. Consider this in every phase of your implementation.**

<p>What is your message to parents about what the change in new materials means for their children?</p>	
<p>What questions do you anticipate getting from stakeholders? Who will answer them?</p>	
<p>What are some milestones in your implementation where you know you'll want to communicate with stakeholders?</p>	