

SANTA ROSA COUNTY DISTRICT SCHOOLS

INSTRUCTIONAL MATERIALS

POLICIES AND PROCEDURES

Foreword

The purpose of this document is to specify the administrative procedures to be followed in managing the textbook and other instructional material resources of the district. Instructional materials are critical elements in assuring the effectiveness of instructional programs. The aim is to provide each student with quality instructional materials with the maximum efficiency and cost effectiveness.

Students must have access to appropriate textbooks and instructional materials for use both in school and at home in all subjects. This requirement will be satisfied by issuing textbooks and instructional materials to each student at the start of the school year.

Careful selection and management of the school's collection of instructional materials are critical responsibilities of teachers, administrators, parents, and students.

MANAGEMENT OF INSTRUCTIONAL MATERIALS RESOURCES

It is the responsibility of the superintendent of schools to maintain and monitor a district-wide system to ensure implementation and periodic evaluation of the overall district needs for appropriate and timely instructional materials. This shall be accomplished by the development, implementation, monitoring, and the appropriate revision of this Instructional Materials Handbook.

Management of instructional materials resources of the Santa Rosa County Public Schools is a responsibility shared by teachers, principals, Division of Curriculum and Instruction, and all other school, area office, and district staff with supervisory or administrative responsibility for instructional programs.

A. Responsibilities of the Principal

1. The school will maintain a collection of textbooks and other instructional materials sufficient to support the instructional program in all courses offered by the school. Each student will be provided with basic text materials in each subject for which a text is appropriate.
2. Instructional materials which are no longer on the district adoption list and have no specific use at the school site will be returned to the textbook warehouse for redistribution.
3. A program for the management of instructional materials that minimizes loss and damage will be established and maintained. This program will include regularly scheduled book checks and inventories.

Instructional material records, reports, and inventories that are required by statute, board policy, and administrative directive will be prepared, maintained, and transmitted.

4. Rigorous efforts will be made to collect the charges to pupils for lost or damaged instructional materials. However, student records and report cards may not be withheld.

5. New materials shall not be requisitioned as long as appropriate, usable district-adopted materials are available for use.

6. The school will be responsible for evaluating materials requested by faculty that are not on the district-adopted list, e.g., supplemental materials or materials for a course unique to the school.

B. Responsibilities of the Superintendent and the Division of Curriculum and Instruction

1. State textbook funds will be allocated considering both the total funds available and the needs of the individual schools.

2. District evaluations of instructional materials being submitted for state-adoption and district listings will be coordinated.

INSTRUCTIONAL MATERIALS ADOPTION, LISTING, AND SELECTION

A. State Adoption

Purpose

The Florida State Instructional Materials Adoption process results in the listing of instructional materials that may be purchased under state contracts. This assures that the best materials are identified and available on a continuous basis at lowest prices possible.

B. District Listing of Instructional Materials

1. Purpose

a. The District Listing of Instructional Materials is intended to place reasonable and practical limits on the number of different series of state instructional materials used in individual courses offered within the Santa Rosa County District Schools. It is a means for assuring the consistency of similar course offerings provided within the Santa Rosa County District Schools and the economic use of the funds provided for the purchase of instructional materials. Santa Rosa County District Schools operate a "District-wide" adoption process in which all grade-levels and /or courses utilize the same textbook/ instructional materials.

b. The District Listing of Instructional Materials shall constitute the recommended and approved instructional materials to be used to implement the instructional materials program of the Santa Rosa County District Schools. *Other instructional materials may not be used in lieu of the materials contained in the District Listing.*

c. This direction is not intended to prevent the use of ancillary and supplemental instructional materials to strengthen or broaden the basic materials appearing on the District Listing of Instructional Materials.

2. Procedures

VENDORS:

- a. As soon as possible after the new state adoptions have been announced, the appropriate district content area coordinator will contact the appropriate vendors based upon district adoption needs. The vendors will be informed of the required paperwork/forms the Santa Rosa County School District requires completion of prior to being considered as vendors in Santa Rosa County for textbook adoption purposes.
- b. Santa Rosa County District Schools operate under a "Closed District" Policy regarding vendor contact with schools. Vendors are to coordinate with the Santa Rosa County District Schools appropriate content area coordinator as their point of contact. Vendors are not to directly contact or communicate with the Santa Rosa County schools regarding materials slated for adoption without first gaining permission from the appropriate Subject Area Coordinator or District Instructional Materials Contact.
- c. Vendors that have appropriate instructional materials based upon district needs and completed paperwork (submitted by deadline) will be invited to present and preview their material(s) for the schools during an Instructional Materials Presentation Seminar scheduled by the District.
- d. Vendor will be asked to send sample packs of the appropriate materials to each school site for review prior to the Instructional Materials Presentation Seminar to enable schools the opportunity to review and formulate questions for the vendors.

SCHOOLS:

- a. Each school shall review the approved materials sent to the school site.
- b. Each school site Principal will be allowed to cast one vote per grade level or course for the textbook/ instructional materials he/she recommends as the district adopted text/instructional materials.
- c. The textbook/ instructional material selected for district adoption will be the one with more than 50% of the votes.
- d. In the event that one text does not have more than 50% of the vote, the two texts with the most votes will be voted upon again.
- e. In the event that neither one of the two texts receive more than 50% of the vote, the district textbook adoption committee comprised of the following persons will make the decision regarding the district adopted text from the text involved in the last vote.
 1. Assistant Superintendent for Curriculum and Instruction

2. Director of High School Education
 3. Director of Middle School Education
 4. Director of Elementary School Education
 5. Content Area Coordinator of textbook being adopted
- f. Once the textbook has been selected, schools will be notified via e-mail.
 - g. The appropriate content area coordinator will maintain the voting ballots for three years.

3. Definitions of Various Instructional Materials

a. Textbooks. This class of items consists of all instructional materials, regardless of format, which appear on the list of instructional materials adopted by the State Board of Education for use in the schools of Florida.

b. Instructional Aids. This class of items consists of instructional materials, regardless of format, that do not appear on the state list of instructional materials adopted by the State Board of Education that are used as primary material to meet one or more instructional objectives in some area of the curriculum. Items in this class include, but are not limited to, the following: novels, plays, works of literature, instructional games, computer software, instructional kits, etc.

c. Supplementary Materials. This class of items consists of instructional materials, regardless of format, that do not appear on the list of instructional materials adopted by the State Board of Education and which do not conform to the definition of instructional aids stated above in subsection "b" but which are used to clarify concepts, enrich background information, or extend learning in one or more areas of the curriculum. Items in this class include, but are not limited to, the following: maps, charts, posters, photographs, films, filmstrips, videotapes, records, pamphlets, newspapers, magazines, study guides, models, workbooks, and sheet music.

C. Selection of Adopted Instructional Materials and Library Books for Individual School Use (Florida Statute 233.165)

1. In the selection of instructional materials, library books, and other reading material used in the public school system, the standards used to determine the propriety of the material shall include:

- a. The age of the children who normally could be expected to have access to the material.
- b. The educational purpose to be served by the material. In considering instructional materials for classroom use, priority shall be given to the selection of materials that encompass the state and district performance standard provided for in SS.229.565 and 232.2454 and that include the instructional objectives contained within the curriculum frameworks approved by the State Board of Education, to the extent that appropriate curriculum frameworks have been approved by the Board.
- c. The degree to which the material would be supplemented and explained by mature classroom instruction as part of a normal classroom instructional program.

d. The consideration of the broad racial, ethnic, socioeconomic, and cultural diversity of the children of this state.

2. No books or other material containing hard-core pornography or otherwise prohibited by Florida Statute 847.012 shall be used in the public school system of this state.

3. Instructional personnel who select and evaluate library materials and other supplementary resources should use the following procedures in their selection:

a. Utilize the following resources when feasible:

(1) Lists prepared by Santa Rosa County District School teachers for inclusion in published subject area guides,

(2) Lists appearing in bibliographies of state-adopted textbooks and teacher's manuals,

(3) Lists appearing in Children's Catalog, Junior High Catalog, High School Catalog, and other lists prepared by the American Library Association,

(4) Lists prepared by national subject area professional organizations (Example: National Council of Teachers of English, Social Studies, Mathematics, etc.),

(5) Professional review media for instructional materials (Example: Lists by national organizations such as Educational Products Information Exchange Institute and Association for Educational Communications and Technology),

(6) Lists produced by commercial firms providing objective reviews, i.e., Booklists, Previews, School Library Journal.

b. Solicit recommendations for purchase of materials from the school staff.

c. Consider the viewpoint of students who will use the instructional materials.

d. Consider suggestions of parents and lay citizens.

D. Requisition of Instructional Materials

1. The following actions shall be utilized in ordering instructional materials:

a. Identify the subjects that will be offered during the next school year,

b. Estimate the membership for each subject being offered,

c. Compare the school's current inventory of textbooks with the number of textbooks needed,

- d. Be aware of which district-adopted and non-adopted instructional materials are available,
- e. Determine the amount of funds available to the school for the purchase of instructional materials.

2. Procedures:

a. *For School Based Purchases:*

- 1. Determine the number of textbooks needed for each course
- 2. Make an order for the textbooks using the publisher worksheet / order form.
- 3. Send the draft order in with the anticipated course enrollment to the appropriate grade level director for approval.
- 4. Once approval has been granted use the following procedures to order textbooks/instructional materials:

b. *For District Purchases for School Sites (New Adoptions) Prior to the end of the fiscal year:*

- 1. Key in a "Request for Purchase Order" to Florida School Book Depository (FSBD) V 559 for .01¢, using the funding line that you would normally use to purchase textbooks.
- 2. On the description pages, in message to Jud area enter: **Return P.O. to School.**
- 3. In message to Vendor area enter: **Attention Liz Inman**
- 4. On the first line in the description area, please enter "Pursuant to Florida Statute 1006.40(6), textbook order in the amount of \$_____". (enter the total amount of the request) Only **enter the total amount in the description area. Under QTY enter 1 and under Amount enter .01**
- 5. On the next line enter "**Classroom Text Books, see attached list**". Then key in "**Do Not Invoice Before July**". Again enter "**Attn: Liz Inman**".
- 6. The resulting purchase order will be returned to the requesting site, by the Purchasing Department, so the list of textbooks may be attached before sending the order to the Florida School Book Depository (FSBD). They will begin processing your order immediately. You may use the Publisher Order form for the FSBD provided the FSBD item numbers are used on the form.

Once you receive your *complete order (No partial payments will be approved, do not send your P.O. until you have received the complete order)*

- a. *Make sure you indicate the correct total (price) on the P.O. by marking through the total price listed (.01) at the bottom right on the P.O., replacing the .01 amount with the total on the invoice*
- b. *Have the principal initial and sign beside the adjusted total. Use the verbiage: "Increase Approved By: Principal's signature " (the invoice may be lower than the total price you indicated in the description area due to shipping not being 5%).*
- c. *Send the invoice and P.O. to the district instructional materials contact*
- d. *The district instructional materials contact will request for the money to be transferred into your budget line.*
- e. *The instructional materials contact will make sure the funds are allocated to your center and the P.O./invoice will be sent to Purchasing.*

Do not make partial payments, wait until the entire order has been received (including "free" items). Schools will be responsible for any additional costs once the P.O and invoice have been sent to the district for payment (this includes any additional shipping charges).

Any purchases a school makes using their school based funds follows regular purchasing procedures.

Any purchases a school makes after July 1 follows regular purchasing procedures.

ALLOCATION OF STATE TEXTBOOK FUNDS

A. District Allocation

The State of Florida, by direct annual appropriation of the Legislature, provides funds with which the district may purchase both state-adopted textbooks and other instructional materials. The annual allocation to each district is calculated by the State Department of Education based on the district's previous year's total of full-time equivalent pupils plus the projected growth in FTE for the current school year.

B. District Allocation Procedure

1. At least a three percent reserve fund shall be set aside from the total district allocation to meet system-wide and/or special needs.
2. As authorized by state statute and based on an estimate of the next year's allocation, calculated at not more than 90% of the allocation to the district for the current school year, the District Instructional Materials Contact shall prepare a request of allocation to each school that provides the following:
 - a. Sufficient funds to be allocated to new schools to provide adequate instructional materials to support the instructional program,

b. A basic per pupil allocation to each school calculated on the funds available and considering, but not limited to, the following factors:

(1) The balance from previous allocations remaining in a school's instructional materials account,

(2) School organization, level, and size,

(3) Additional factors such as anticipated increase or decrease in membership, the addition or elimination of grade levels, or significant changes in course offerings.

3. The list of recommended school allocations shall be approved by the Assistant Superintendent for the Division of Curriculum and Instruction.

4. Under normal circumstances, funds allocated to schools for the purchase of instructional materials during any school year should be expended during that school year.

5. The Assistant Superintendent for Curriculum and Instruction, or designee shall notify the individual schools of the amount of their estimated allocation for the next school year during the first week in July. Generally, allocations for each school shall be budgeted with 50% to be used only for the purchase of state-adopted instructional materials and, 50%, to be used for the purchase of either adopted or non-adopted instructional materials at the option of each school and within the intent of the District Listing of Instructional Materials.

6. The purpose of the optional textbook funds is to provide ancillary and supplemental materials to assist, enhance, strengthen, or broaden the basic materials appearing on the District Instructional Materials List.

7. In special instances, e.g., vocational, special or alternative school centers, the 50%/50% formula may be adjusted by the Associate Superintendent for the Division of Curriculum and Instruction to meet the instructional material needs of the school center.

INVENTORY RECORDS

The individual school's inventory should be maintained at the school for annual review by the grade level director. Records of receipts, returns, and otherwise disposed materials will be maintained on the inventory. Principals are responsible for the proper accounting and inventory of textbooks (Florida Statute 233.46(6)).

LOST OR DAMAGED INSTRUCTIONAL MATERIALS

A. Responsibilities

1. It shall be the duty and responsibility of each principal to collect from each pupil or the pupil's parent the purchase price of any instructional material the pupil has lost, destroyed, or unnecessarily damaged and to report and transmit such amounts so collected to the Superintendent (Florida Statute 233.46(2)).

2. In practice, it is difficult to make all collections. However, schools should endeavor to meet their responsibilities both to pupils and to the taxpayers who provide the books.

B. Procedures

1. Reimbursement for lost or damaged materials should be sought first from the responsible student.
2. If a charge remains unsettled for more than one week, notice of the reason for the charge and amount due should be directed to the parent. If parents cannot be contacted in person, notification should be mailed. *A form letter is available from the Textbook Coordinator.*

C. Charges

1. Charges to be assessed for book damage should be determined by the principal. Charges for any lost text may be the full price paid for the text regardless of age or condition.
2. All money collected from the sale, exchange, loss, or damage of instructional materials shall be transmitted to the Superintendent to be deposited in the district school fund and added to the district appropriation for instructional materials (Florida Statute 233.46(4)).

The district will credit all monies collected for lost or damaged books to the school's textbook funds.

D. Unsettled Charges

Each unpaid charge should be handled on an individual basis. Excusing a student from payment of charge may be necessary when the nonpayment of charges for lost, damaged, or destroyed state-adopted materials is due to extenuating conditions. In each case, the principal may choose one or more of the following:

1. Lend the student a book until he can pay the assessed charges.
2. Provide for installment payments.
3. Reduce or forgive the amount of the charges in cases of hardship.

SALE OF STATE-ADOPTED INSTRUCTIONAL MATERIALS

A. The principal, when requested by the parent of a pupil in the school where he or she is employed, shall sell to such parent any instructional materials used in the school. All such sales shall be made under regulations prescribed by the School Board (Florida Statute 233.46(3)).

B. The receipts from such sales shall be transmitted to the Finance Department for deposit in the appropriate fund account. All money collected by a school for the sale of instructional materials will be credited to the school's textbook account.

C. Requests for instructional materials by persons other than parents of a student in the school, or for more than one copy of an instructional material, should be referred to the district Textbook Coordinator.

DISPOSITION OF INSTRUCTIONAL MATERIALS

A. Disposition of Surplus or Unusable State-Adopted Instructional Materials by School

1. All surplus or unusable instructional materials must be returned to the warehouse for recirculation or disposal with the following exceptions:

a. Worn out or obsolete books may be given to teachers to use in developing supplementary teaching materials or given to students in the school under the following conditions:

(1) The principal certified that the books are physically unusable or that the content is obsolete,

(2) Such books are clearly marked showing that the ownership labels are no longer valid,

(3) Books to be given to teachers or students under these stated conditions are to be reported to the Textbook Coordinator for approval. On the Return of Textbook Form (see Exhibit C), indicate under Inventory Adjustment whether these books will be given to a teacher or a student. These books cannot be distributed until the school has been given approval by the Textbook Coordinator.

2. For all instructional materials to be returned to the textbook warehouse, use the Return of Textbooks Form (see Exhibit C). If the material is on inventory, the list must include quantity, textbook key number, edition date, title and grade or level, and inventory adjustment.

B. Disposition of Surplus or Unusable State-Adopted Materials by the Textbook Warehouse

1. The warehouse shall organize and display surplus materials to be available for selection and use in other Santa Rosa County District Schools.

2. After the needs of the Santa Rosa County District Schools are satisfied, a listing of this usable surplus material will be made available to the State Exchange Program for use in other school districts by the DOE Department of Instructional Materials.

3. The Division of Curriculum and Instruction may offer the remaining materials to governmental or charitable organizations which are in compliance with applicable statute, federal law, and governmental regulations.

4. Remaining unsuitable or surplus materials will be advertised as being available for purchase in bulk or in specified lots as waste paper to agencies which are in compliance with applicable federal law and governmental regulations.

5. Remaining materials will be offered free to the public.

6. After all State Board of Education prescribed disposal procedures have been attempted, textbooks and other such instructional materials may be disposed of by shredding, landfill, or any other appropriate means available (School Board Rule 6Gx5-3.06(2)).

C. Disposition of Non-Adopted Instructional Materials Non-adopted instructional materials including library books and audiovisual materials shall be used until no longer usable either because of physical condition or obsolete content. The principal is authorized to dispose of such materials by giving such material to pupils in his school; however, where practical, each piece shall be marked to show that it has been declared surplus and is no longer of value to the school's instructional program. Material which cannot be disposed of in this manner shall be returned to the Warehouse for disposition either through donation to a charitable institution, by sale in bulk for waste paper, or by burning, dumping, or other available means.

D. Disposition of New Unstamped Books New, unstamped books which exceed school need may be returned to the textbook warehouse for credit by listing on Return of Textbook Form (see Exhibit C) and marked "new" along with a copy of the voucher on which the school received the books.

CHALLENGED MATERIALS

The School Board believes that the selection, challenge, and removal of instructional materials are within its jurisdiction in accordance with appropriate statutory and constitutional law.

Instructional materials for use in school library media centers or classrooms shall be carefully selected. Such materials may include, but will not be limited to, textbooks, ancillary materials, library books, curriculum materials, and non-print materials.

In all cases where materials being used in a school are challenged, they should be challenged at the level where the materials are being used and referred to the Superintendent and Board only if the citizen is not satisfied with the handling at the local level. (Refer always to Board [Policy 4.30](#))

Grievances Concerning Instructional Materials

Any citizen may file a complaint with a school concerning the use of instructional materials. Instructional materials being questioned shall NOT be removed from use until the following informal and/or formal grievance procedures have been completed.

Complaints shall be handled as follows:

School Level – Informal

- 1) The complainant shall first contact the teacher or library media specialist at the school site with the complaint. Every effort shall be made by the respective school center to resolve such issues at this level. If the issue is not resolved at this point, proceed to Step 2.
- 2) The principal and appropriate staff member(s) should meet with the complainant to explain the criteria and procedures used to select materials and the role which the material in question has in

that school's curriculum. If the complainant is not satisfied by the explanation and desires to file a formal complaint, that person may do so as follows:

Secure and complete:

- The Checklist for Citizen's Request for Re-Evaluation of Instructional Materials
- The Citizen's Request for Re-Evaluation of Instructional Materials form (adapted from the Davies-Brockuell Media Selection Policy and the National Council of Teachers of English)

Checklist and form are available from the school's media specialist and on the District web site. If the complainant does not return the form, the complaint will be given no further consideration.
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3) Retain one copy and send a copy of the completed forms to each of the following:

- the principal (original)
- the Assistant Superintendent for Curriculum & Instruction
- the Superintendent
- Director of Media Services

4) Within 5 workdays from receipt by the principal of the complaint form, the completed information will be studied by a School Materials Review Committee (SMRC), which shall be appointed on an ad hoc basis by the principal and which shall meet as follows:

- The committee shall consist of two teachers in the appropriate subject or grade; a library/media specialist; one student (middle/high school only); the principal or assistant principal; a counselor; a community representative; the Language Arts Curriculum Specialist; and the Director of Media Services. The SMRC will study the information on the form, review the material in question, and within 10 workdays of establishment of the committee will render a written recommendation on the SMRC form to the principal based on the following criteria as appropriate:

*educational significance

*quality

*appropriateness to level of user

*organization and presentation of content

*relationship to the course of study/curriculum

*timeliness

*potential user appeal

*validity, accuracy, and objectivity of information

- The SMRC may solicit and/or review comments from appropriate audiences or resource persons.
- The principal will make the selection criteria available to interested persons.
- Within 5 workdays after receipt of the SMRC recommendation, the principal shall render a written, final, school-level decision and forward same with the SMRC recommendation to the Superintendent, Assistant Superintendent for Curriculum & Instruction, and the party requesting the review. The complainant may appeal the decision of the principal to the Superintendent of Schools in accordance with the following provisions:

District Level – Formal Appeal

- 1) The complainant shall notify the Superintendent in writing of the request for an appeal.
- 2) Within 15 workdays from receipt of such request, the Superintendent and appropriate staff will review the action taken at the school level and will issue a decision. If the decision does not include further review, the complainant will be so notified in writing and may then request an appearance to appeal directly to the School Board in accordance with School Board Policy.
- 3) If the Superintendent finds cause for further review, he will, within 15 workdays from receipt of the written complaint, submit it to a District Materials Review Committee (DMRC), appointed on an ad hoc basis by the Superintendent, with the following provisions:
 - a) The committee should consist of a minimum of 7 people. Membership may be drawn from library/media specialists, two teachers in the appropriate subject area/grade level; the Director of In-service & Instructional Technology or designee; two principals at the appropriate level; an assistant principal; Assistant Superintendent for Curriculum & Instruction or designee.
 - b) The DMRC will study the information on the “Citizen’s Request for Reconsideration of Instructional Materials” form and the SMRC’s recommendations, review the material in question, and make a recommendation to the Superintendent within 10 workdays of their receipt of their request.
 - c) The DMRC may solicit and review comments from appropriate audiences or resources persons.
 - d) The material in question will be made available for review upon request of interested persons.
 - e) The Superintendent shall make a final administrative decision and will send a copy of that decision to the principal, Assistant Superintendent for Curriculum & Instruction, and the complainant within 5 workdays from receipt of the DMRC recommendation.
4. The complainant may appeal in writing to the School Board such decision of the Superintendent and may request an appearance before the Board in accordance with School Board Policy.

[Citizen's Request Form for Re-Evaluation of Instructional Materials](#)

http://www.santarosa.k12.fl.us/pdc/lms/files/63-11-62IMGpcit_req08.pdf

[Checklist for Citizen's Request for Re-Evaluation of Instructional Materials](#)

http://www.santarosa.k12.fl.us/pdc/lms/files/63-11-61IMGpchk_cit08.pdf

[Checklist for Materials Review Committee for Re-Evaluation of Instructional Material](#)

http://www.santarosa.k12.fl.us/pdc/lms/files/63-11-63IMGpchk_mat_rev08.pdf