

Sumter County School District

# Instructional Materials Procedures Manual

**Including a description of state and district policy  
regarding selection, adoption, funding and allocation  
of instructional materials.**

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# Statement of Purpose

Historically, the process of selecting appropriate instructional materials for Sumter County School District (SCSD) was via a local committee to review textbooks from a state adopted list and make the best selection possible to meet local instructional and student needs. While this process continues to be consistent with state regulations, the reality of living in an information age is changing the entire landscape of instructional materials selection and use.

Our students and teachers live in a digital age in which limitless information is available to anyone connected to the internet. No longer are one prescribed textbook and the teacher the only sources of information provided to students for their learning. Instead, students have access to a variety of instructional content resources in a variety of formats.

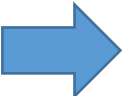





SCSD's new challenge is to help students and teachers select, sort, critique, judge and use information from a limitless menu of resources to provide the best learning opportunities. This task in many ways is more difficult than selecting the best option from a list of textbooks. Our students must not only learn content-based information, but they must also be taught how to effectively search, review, and utilize information resources and learning materials.

To best facilitate learning, all teachers will use a combination of digital and print content, learning laboratories, manipulatives, electronic media and other materials to help students apply critical thinking to instructional content. Educators will guide students using these materials in a way that will enable them to compare content, separate fact from fiction, evidence from opinion, recognize bias, detect propaganda techniques and analyze information from multiple perspectives while connecting it with their own understandings and values. These higher order-thinking skills will not only serve students well in college or in a career, but also as life-long learners in our democratic society.

## **Designation of Responsibilities**

Our local School Board has the ultimate responsibility for the adoption of classroom instructional materials. The responsibility for the selection of print and non-print materials (including online resources) is delegated to the professionally trained educational personnel of the district.

The selection of materials may involve many people, including principals, teachers, supervisors, library/media specialists, students, parents and members of the community. The responsibility for coordinating the selection of most instructional materials and making purchase recommendations rests with the appropriate certificated personnel while adhering to Florida state law and regulations. Our vision for selection and use of instructional materials to transform from past practices to new processes is included in the following flow chart:

Moving from...		Moved to...
Instructional materials - the main tool for content delivery.		Instructional materials - used for assessment, reference, or as manipulatives to enhance learning.
The teacher's job to teach the textbook.		Teachers use a variety of information resources to achieve learning goals.
Instructional materials have a fixed content.		Teachers teach the standards set forth by the Florida Department of Education.
Content taught for the duration of an adoption period.		<p>The teacher accesses the content in adopted instructional materials to</p> <ul style="list-style-type: none"> <li>• support student learning</li> <li>• provide a means for acquiring knowledge</li> <li>• meet standards that are the foundation of a course of study.</li> </ul>
Teacher reiterates the content contained in the textbook.		Students work independently and in groups in a variety of educational situations where they make choices using a variety of instructional resources.
Use of instructional material was designated by grade and subject area.		<p>Students have the resources that are needed to address their modality of learning.</p> <ul style="list-style-type: none"> <li>• A variety of instructional materials allow students at different performance levels to achieve optimal learning.</li> <li>• Technology and digital content play are key tools to improving a student's learning experience.</li> </ul> <p>Student critical thinking and problem solving abilities are enhanced.</p>

## SCSD Instructional Materials Transition & Vision

SCSD has transitioned from an instructional materials model where the instructional materials were the main tool for content delivery to a model where instructional materials are used for assessment, reference, or as manipulatives to enhance learning.

In the past, a teacher's job was to teach the textbook. Instructional materials contained fixed content that was taught for the duration of an adoption period. The teacher reiterated the content contained in the textbook. The use of an instructional material was designated by grade and subject area and the content was fixed.

The current expectation is that teachers use a variety of information resources to achieve learning goals and teach the standards set forth by the Florida Department of Education. Today, the teacher is expected to assess the content in the adopted instructional materials and use these materials to support student learning. The main role of instructional materials is to provide a means for acquiring the knowledge and meeting standards that are the foundation of a course of study. As part of the learning process, students work independently and in groups in a variety of educational situations where they make choices using the instructional material tools provided. It is expected that students have the resources that are needed to address their modality of learning. It is also expected that the use of technology and digital content will play key roles in improving a student's learning experience. A variety of instructional materials allow students at different performance levels to achieve optimal learning.

### Instructional Material Resources Selection and Dissemination

Instructional materials fall into several categories representing a continuum from materials that are formally adopted by a school district to those that an individual teacher selects or develops for personal use in their own classroom.

It is expected that bundles of instructional resources composed of hard copy, digital and hands-on materials will be used in the typical classroom. While district-adopted materials serve as the primary instructional resource, a wide range of materials from many sources may be used to support student learning. A description and depiction of the process for the selection and distribution of instructional materials is outlined below and within this manual.

### Supplementary Materials Selection

Supplementary materials used at schools are approved by the building principal. The review process for the selection of supplementary materials is determined by the school and a list of supplementary materials should be maintained at each school site. ~~These materials are selected based on many factors including the purpose and value to the lesson, suited to student needs and their ability to comprehend the material presented, or is appropriate for the grade level and age group for which the material is used.~~

**In the selection of instructional materials, library media, 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 students 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, which encompass the State and Board performance standards provided for in F.S. 1001.03(1) and which include the instructional objectives contained within the curriculum frameworks approved by rule of the State Board of Education.

- c. the degree to which the material would be supplemented and explained by mature classroom instruction as part of a normal instructional program;
- d. the consideration of the broad racial, ethnic, socioeconomic, and cultural diversity of the students of this State

The principal is responsible for allocating funds at the school level for any supplementary materials expenditures not covered by the district textbook adoption process.

Please visit the Florida Department of Education (FLDOE) website for more information on state instructional materials adoptions at [http://www.fldoe.org/bii/instruct\\_mat](http://www.fldoe.org/bii/instruct_mat)

## State Instructional Materials Laws

[Chapter 1006 of Florida Statutes](#) defines courses of study and instructional aids. Specifically, “instructional materials” are defined as items having intellectual content that by design serve as a major tool for assisting in the instruction of a subject or course. These items may be available in bound, unbound, kit or package form and may consist of hard-backed or soft-backed textbooks, electronic content, consumables, learning laboratories, manipulatives, electronic media, and computer courseware or software, that serves as the basis for instruction for each student in the core subject area of mathematics, language arts, social studies, science, reading and literature.

This is an expanded definition of what is generally classified as “textbooks.” The Florida Catalog of Instructional Materials reflects the new definition by providing a wide variety of instructional materials.

Each district school board shall adopt rules, and each district school superintendent shall implement procedures, that will assure the maximum use by the students of the authorized instructional materials.

Current Sumter County School Board Rules pertaining to Instructional Materials can be found at the following link - [Policy 2520](#) [Policy 2521](#) [Policy 2522](#)

## State Adoptions

The state adoption process is initiated by the Commissioner of Education who makes recommendations about subject areas to be considered and selection committees. State selection committees are made up of professional educators and members of the public, State committees, using established state criteria, evaluate materials submitted and make recommendations for the adoption of materials. The commissioner submits the committee recommendations to the State Board of Education. When the recommendations are approved by the Board, the materials become state adopted and are placed on contract usually for a period of five years. For information regarding the state instructional materials adoptions, you can visit the website at the following link [Florida Adoption Cycle](#)

Cyclic adoption is of paramount importance. It means that books adopted in one subject area remain adopted for a five-year period. This provides for a phasing-in of instructional materials in that subject area. It also provides for adoption of different subject areas every year. There are occasionally some

exceptions to the five-year period of adoption, especially in curriculum areas such as technology, which may experience rapid changes. Periodic state attempts at balancing the overall cost of yearly adoptions to the districts may result in other exceptions to the normal five-year adoption period. Also, because of the wide number of courses in some subject areas, sometimes only a part of the total materials in a certain area may be adopted.

## **Funding**

~~Funds to purchase~~ **Funding for instructional materials are allocated in the district budget that is annually approved by the school board.** ~~categorical; that is, they are earmarked by the Legislature for the specific purchase of these instructional materials. Based on student projections and material costs provided by the Department of Education, the Legislature decides annually the amount of funding for instructional materials. Funding varies from year to year, depending upon anticipated state revenues.~~

~~A preliminary allocation is made to each district based on projected enrollment provided by the district. The funds may be expended for instructional materials selected from the Florida School Book Depository Catalog for Instructional Materials as well as from other sources.~~

## **State Rules and Guidelines for Instructional Materials Adoptions and Purchases**

Each district school board must purchase current instructional materials to provide each student with a major tool of instruction in core courses of the subject areas of mathematics, language arts, science, social studies, reading, and literature for kindergarten through grade 12. Such purchase must be made within the first 3 years after the effective date of the adoption cycle.

Each superintendent of schools shall notify the Department of Education by March 31<sup>st</sup> of each year the state-adopted instructional materials that will be requisitioned for use in his or her district. All materials must be aligned to standards. The notification shall include a district plan for instructional materials use to assist in determining if adequate instructional materials have been requisitioned. It is the intent of the Department of Education to simplify to every extent possible the collection of this information. It will be made available to the Florida School Book Depository who will, in turn, share the information with the publishing industry. This will provide the publishing industry with information necessary to print on demand supplies sufficient to fill orders for delivery prior to the fall opening of schools. This notification from superintendents will be directly tied to the adoption schedule approved by the Commissioner. Information will be solicited from districts to identify: 1) which publisher(s) is selected, and 2) quantities requisitioned in each newly adopted subject area to assure that adequate and current materials are being made available to students and teachers.

## **State Instructional Materials Councils**

When it is time to seek a new adoption of materials in a subject, the Department of Education will call for an adoption and implement a process for the adoption. This process is outlined in several sections of Florida Statute beginning with section [1006.29](#).

## District Evaluation Committee

The state adopts instructional materials and provides that list to districts. Each district then establishes local committees to select those items which best meet the needs of local students and support the curriculum. The committees are established by designees from the Curriculum and Instruction Department.

### The 2023 Florida Statutes- (Rules for Materials Reviewers)

**1006.30** Affidavit of state instructional materials reviewers.—Before transacting any business, each state instructional materials reviewer shall make an affidavit, to be filed with the department, that:

- (1) The reviewer will faithfully discharge the duties imposed upon him or her.
- (2) The reviewer has no interest in any publishing or manufacturing organization that produces or sells instructional materials.
- (3) The reviewer is in no way connected with the distribution of the instructional materials.
- (4) The reviewer does not have any direct or indirect pecuniary interest in the business or profits of any person engaged in manufacturing, publishing, or selling instructional materials designed for use in the public schools.
- (5) The reviewer will not accept any emolument or promise of future reward of any kind from any publisher or manufacturer of instructional materials or his or her agent or anyone interested in, or intending to bias his or her judgment in any way in, the selection of any materials to be adopted.
- (6) The reviewer understands that it is unlawful to discuss matters relating to instructional materials submitted for adoption with any agent of a publisher or manufacturer of instructional materials, either directly or indirectly, except during the period when the publisher or manufacturer is providing a presentation for the reviewer during his or her review of the instructional materials submitted for adoption.

History.—s. 305, ch. 2002-387; s. 22, ch. 2011-55.

## Guidelines for Instructional Materials Adoption in Sumter County

**The process for adopting instructional materials is outlined below:**

1. Curriculum and Instruction (CI) department consults the FLDOE website for short list of bids and/or final state bid list for adoption selections.  
(<http://www.fl DOE.org/academics/standards/instructional-material>)
2. The subject area specialists will meet with the Assistant Superintendent to discuss the adoption process and determine due dates to meet state requirements.
3. CI staff will provide a textbook evaluation rubric and other necessary forms.

4. The subject area specialist review the ~~bid list~~ **state adopted list** and does a preliminary review to ensure that the publishers meet district technology specification and provides both digital and paper based options.
5. The staff contacts publishers to receive online access information including public access information for ALL materials being considered.
6. Publishers will be asked to provide a signed Sumter County School District Instructional Materials Adoption Information Form.
7. The subject area specialists select dates, arrange meetings, and notify reviewers. When appropriate they may invite publishers to make presentations of materials. All meetings convened for the purpose of ranking, eliminating, or selecting instructional materials for recommendation to the district school board must be noticed and open to the public in accordance with s.286.011. Any committee meeting convened for this purpose must include parents of district students.
8. Subject area specialists are responsible for maintaining records related to the specific adoption including, but not limited to:
  - a. List of meeting dates and summary minutes
  - b. Committee evaluation forms/rubrics
  - c. Recommendation for use of ancillary materials, both print and digital
9. Reviewers utilize a textbook evaluation rubric to provide feedback regarding materials.
10. Digital access is provided to all subject area teachers and administrators during the review process. All teachers and administrators are asked to complete the evaluation rubric.
11. The content expert pulls the rubric results.
12. Each grade level at each school submits their choice to the school principal and content expert.
13. The District review committee will be convened. The review committee must consist of:
  - a. SAC Member (parent)
  - b. Subject area expert
  - c. Administrator
  - d. Teacher in the core subject area being considered
14. Presentations will be scheduled and the committee will cast their vote in the selection of the instructional materials to be used for the specified core content area.

**Final Selections Approval Process:**

1. CI/IT staff will utilize the vendor information form to determine if the final materials selections can be approved for use in our district based on technology requirements.



2. The CI/IT staff will call vendors/publishers to clarify answers or ask additional questions if needed and communicate any unresolved issues.
3. Once materials have been vetted by Curriculum & IT staff, the list of final selections will be provided to the Sr. Director of Curriculum & Instructional Services and Assistant Superintendent.
4. After receiving the final recommendations, CI staff will prepare appropriate documentation needed for Board approval.
5. Final selections will be posted on district website for public review at least twenty (20) calendar days prior to School Board consideration.
6. The School Board will conduct an open noticed public hearing to receive comments on the final materials selected. Team members from Curriculum and Instruction and will be in attendance to answer questions pertaining to the selected materials
7. Following Superintendent and School Board approval, CI staff will communicate the recommendations to appropriate personnel (e.g., principals, assistant principals, and District Office staff).
8. After the approval of materials by the School Board, a parent of a currently enrolled SCSD student or resident may file a petition to contest the Board's adoption of a specific instructional material utilizing the approved form that is posted on district website.
  - a. Objections must be submitted within 30 days of school board approval of selected materials.
  - b. 30 days after the 30-day period has expired, the school board must conduct at least one open public hearing on all petitions timely received
  - c. The petitioner will receive written notification of the date and time of the hearing at least 7 days prior to the hearing.
  - d. The school board's determination at the end of the hearing is final and not subject to further petition or review.
9. CI staff determines what ancillary materials will be offered with the selected materials by collaborating with the vendor. Upon approval, CI staff and the vendor will create an order worksheet that will be utilized to order materials.
10. CI staff will complete cost estimates to develop an adoption budget that will be submitted to Finance
11. The superintendent shall notify DOE by March 31<sup>st</sup> of each year of the state adopted instructional materials that will be requisitioned for use in the district.

## **Professional Development Learning**

A Professional-Development Learning plan for implementation of the new instructional materials must be developed. The Principal will work with the Director of Professional Development-Learning to arrange a five-year in-service and training plan for all newly adopted materials.

Rules Governing Publishers during the Adoption Process are outlined in Florida Statutes [1006.32](#).

All publishers are advised that any infractions of the above stated guidelines may result in their products being removed from consideration and must sign agreement to adhere to these guidelines. The District may not request physical copies of materials for review, but law does not prohibit the publisher from providing them.

## **Overview of Instructional Materials Adoption Process**

### **Year of Adoption:**

1. State adopts instructional materials
2. District adopts instructional materials by April 1<sup>st</sup> and notifies DOE which makes information available to Florida School Book Depository.

### **Within the first 3 years of the Adoption: ~~First Year of Adoption Cycle:~~**

1. District purchases instructional materials
2. Implements Program and Provides In-service

## **Materials Not Adopted by the State (Flexibility Fund)**

Instructional materials which are not adopted can still be ordered utilizing “flexibility funds”. These funds represent a portion of the total instructional materials allocation that can be used to buy materials which are not state adopted, yet approved for use within the school district. The maximum amount that a district may spend on non-adopted materials is fifty percent of its total allocation. Purchases must be for intellectual content materials only.

## **Excerpts of State Laws Relating to Instructional Materials**

### **Duties of the Principal**

According to state law, the duties and responsibilities of the principal for instructional materials management and care include:

1. Proper Use of Instructional Materials: The principal is responsible for assuring that instructional materials are used to provide instruction to students enrolled at the grade level or levels for which the materials are designed, pursuant to policies of the school board.

*It shall be the responsibility of the principal to effectively communicate to parents the manner in which instructional materials are used to implement the curricular objectives of the school.*

2. **Money Collected for Lost and Damaged Books:** 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 district school Superintendent. Principals are authorized to collect the FULL PURCHASE PRICE, regardless of the material's age. The failure to collect such sum upon reasonable effort by the principal may result in the suspension of the pupil from participation in extracurricular activities or satisfaction of the debt by the pupil through community service activities at the school site as determined by the principal. Documentation of "clearance of debt" must be kept on file and be provided upon request by the District.
3. **Disposition of Funds:** All money collected from sale, exchange, loss, or damage of instructional materials is to be transmitted and deposited into the district school fund and added to the district appropriation for instructional materials.
4. **Conservation and Care:** Principals shall assure that all books issued to the school are cared for and accounted for properly. Principals shall see that all books are fully and properly accounted for on forms prescribed by the state and the district instructional materials administrator.
5. **Records and Reports:** Principals shall prepare and transmit such textbook records and reports as may be required by the Department of Education and such supplementary records and reports as the Superintendent may direct.

## **Responsibility of Pupils, Parents, or Guardians for Instructional Materials**

All materials purchased by the district are the property of the district. When distributed to pupils, such materials are merely on loan and are to be returned at the direction of the principal or teacher in charge. Each parent or guardian shall be held liable for any loss or destruction of, or unnecessary damage to, such materials or for failure of the pupil to return materials, and shall be required to pay for such loss, destruction, or unnecessary damage as provided by law.

The school principal, upon request of the parent of a student in the school, shall sell to the parent any instructional materials used in the school. All such sales shall be made pursuant to rules adopted by the Board, and the principal shall annually provide information to parents that they may purchase instructional materials and how to purchase materials. A student or parent(s) may purchase a copy of the duly adopted textbook, regardless of format, for the District's purchase price, including shipping.

## **Reconsideration of Instructional Materials**

When a parent disagrees with the materials being used in the instructional program of the school district of Sumter County, a complaint may be registered as guided by School Board Rule [2522](#). The School Board will not accept challenges/~~go through the challenge process~~ for any textbook currently on the Florida state approved adoption list.

## **School Adoption Cycle**

~~The state adoption cycles every five years. Instructional materials need not be discarded every five years if they continue to meet the needs of the instructional program and align with state standards.~~

## **Special Programs Textbook Funding**

### **Dual Enrollment**

Instructional Materials purchased by the district school board on behalf of dual enrollment students shall be the property of the Sumter School Board. Instructional materials assigned for use within dual enrollment courses shall be made available to dual enrollment students free of charge. Dual Enrollment books shall be used for the term in which they are utilized at the college/institution.

Non-Consumable: All dual enrollment materials are considered non-consumable and should not be written in, highlighted, or altered. This includes all textbooks, lab manuals, solutions manuals, workbooks, etc.

Late Fees: The timely return of dual enrollment materials is essential. Students are given specific dates to return the materials in order to ensure they are available for students enrolled in courses during the next semester. The current fine for the late return of dual enrollment materials is \$10 per item, per day up to the total cost of the resource. District staff will be required to collect from each student or the student's parent the purchase price of any dual enrollment material the student has lost, destroyed, or unnecessarily damaged.

Providing instructional materials for the implementation of advanced courses is the responsibility of the school. Additional FTE funds are provided by the state to schools who have students making a score of four or higher on the International Baccalaureate examination. It is from these additional funds that advanced courses instructional materials and advanced courses teacher bonuses are to be funded.

### **Advanced Courses (AP & AICE)**

AP (Advanced Placement) programs offer rigorous courses that colleges like to see on high school transcripts. AP courses are excellent preparation for college. AP courses follow a curriculum mandated by ~~the~~ College Board. When AP redesigns a course or launches a new one, teachers have two years to get ready. During this time, AP provides resources and professional ~~development~~ **learning** to help teachers understand, plan, and implement the new or redesigned course. AP instructional materials do not follow the state adoption cycle and are adopted as mandated by ~~the~~ College Board.

For more information the following web site provides information on state policies and programs to support AP. <http://ecs.force.com/mbdata/mbprofgroupall?Rep=APA>

Providing instructional materials for the implementation of an AP program is a shared responsibility between the school and the district. Additional FTE funds are provided by the state to the district who have students making a score of three or higher on AP examinations. Districts must allocate at least 80% of the funds to the high school generating the funds. It is from these additional funds that AP instructional materials for electives and the difference between the cost of the textbook for the core course and AP course are to be purchased.

## **~~Creating a requisition at FSBD.com~~**

~~Complete the textbook requisition form from the Florida School Book Depository, titled "School Requisition Attachment". Group items by subject area. Fill in all information: state book number, title, series, level, edition, publisher, year, unit price, and extension.~~

## **Instructional Materials Inventory and Disposal Procedures**

### **Inventory**

1. All adopted instructional materials or other instructional materials purchased by the district must remain in inventory as directed by the CI Department.
2. Instructional materials may be removed from the inventory only if one of the following conditions apply:
  - a. the material is lost
  - b. the material is purchased by someone at the school (e.g. a parent)
  - c. the material is damaged in such a manner as to become unusable (e.g. water-damaged)
  - d. the material is no longer in adoption and new material has been adopted in its place by the state and the district
  - e. the material is no longer used in the school due to curricular change(s) or student enrollment changes - in this case, the material shall be transferred to another site where it can be used if appropriate

### **Policy and Procedure for Disposal of Instructional Materials**

Instructional materials that have become unserviceable or surplus or are no longer on state contract may be disposed of, under adopted rule of the district school board, by:

1. Giving or lending the materials to other public education programs within the district or state, to the teachers to use in developing supplementary teaching materials, to students or others, or to any charitable organization, governmental agency, home education students, private school, or state.
2. Selling the materials to used book dealers, recycling plants, pulp mills, or other persons, firms, or corporations upon such terms as are most economically advantageous to the district school board.
3. The district school board may prescribe by rule the manner for destroying instructional materials that cannot be disposed of as provided in subsection.
4. All moneys received for the sale, exchange, or other disposition of instructional materials shall be deposited in the district school fund and added to the district for appropriation of instructional materials.
5. Instructional materials which have been sold, exchanged, lost, destroyed, or damaged and for which proper charges have been assessed and collected, and instructional materials which have

been destroyed by fire or storm damage or by order of a competent health officer or the district school superintendent, shall be dropped from the record of instructional materials for which, as provided by law, district school boards are held responsible.

6. The CI office will arrange pickup at the schools. Schools should ensure that the materials are available for pickup when notified of the schedule.
7. Books can be offered to students and their families first. They can then be offered to community groups, private schools or interested organizations. Remaining books will be disposed of through used book vendors or paper recycling plants.
8. Schools should prepare for the collection of their remaining titles by gathering the unwanted materials into an area where these items can be easily removed by the company contracted by CI staff to remove the unwanted textbooks. The CI department will inform Textbook Managers and bookkeepers as to when pick up is scheduled for their facilities