

Instructional Materials Review Process Milestones



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This list highlights common tasks in the instructional materials adoption review process. Not every milestone will apply to every district, and some districts may include additional steps along the way. While the milestones are organized by a typical timeline, they do not need to be completed in a specific order.

EARLY SPRING

PLANNING PHASE

Milestone: Determine District Vision

Description: Establish a clear vision for the content area, instructional practices, student experience, and role of instructional materials to ensure all evaluation and selection decisions align to district priorities and expectations for teaching and learning.

Milestone: Determine Courses and Grade-Levels for Review

Description: Identify all courses included in the adoption, including core and advanced courses, based on district needs, student enrollment, and program offerings to ensure full coverage of required instructional materials.

Milestone: Determine Types of Materials to be Reviewed

Description: The district must determine whether materials reviewed will include digital, print, or both formats, and whether the scope of the review will include only core instructional materials or also supplemental and ancillary resources.

Milestone: Identify Non-Negotiables and Screening Criteria

Description: Define required features and constraints for materials, including technical specifications, alignment to standards, accessibility for diverse learners, and compliance requirements to screen materials prior to full review.

Milestone: Determine Instructional Materials Budget

Description: Develop a comprehensive budget based on courses, student enrollment, staffing, and material costs, including consideration of funding sources, replacement needs, and long-term purchasing plans.

Description: Establish key dates, meeting schedules, locations, and operational logistics, including public notice requirements, space, technology needs, and accessibility to ensure a compliant and efficient adoption process.

Description: Design or refine the evaluation tool to align with district priorities, ensuring it captures criteria for content quality, instructional alignment, and additional district priorities such as inclusivity, accessibility, and supports for diverse learners.

PLANNING PHASE |||||||

Description: Create and distribute application and/or nomination forms for internal staff and external stakeholders, including parents and community members, to support a transparent and representative selection process.

Description: Define and implement a structured process for recruiting, reviewing, and selecting committee members to ensure balanced representation, required participation, and alignment to district expectations.

Description: Define clear criteria for committee membership, including role, experience, representation, and required commitments, to guide consistent and equitable selection decisions.

Description: Establish the structure of the review committee, including roles, responsibilities, and expectations for participation to ensure clarity, accountability, and effective collaboration throughout the process.

Description: Create a communication plan that outlines how information will be shared with internal stakeholders and the public, including timelines, updates, and opportunities for engagement.

Milestone: Develop Process for Public Input

Description: Design and implement a process for collecting and incorporating feedback from staff, families, and community members during the review process to support transparency and informed decision-making.

Milestone: Finalize District Evaluation Tool and Scoring Protocols

Description: Finalize the evaluation tool and establish scoring protocols and guidelines to ensure consistent, reliable, and evidence-based evaluation of instructional materials across all reviewers.

ADOPTION PHASE ||||||||||||||||||

Milestone: Issue Requests for Materials to Publishers

Description: Distribute formal requests to publishers to submit instructional materials for review, including timelines, submission requirements, and expectations for participation in the district process.

Milestone: Provide District-Specific Submission Requirements

Description: Share all required district documentation with publishers, including forms, assurances, and any required attestations to ensure materials meet district expectations prior to review.

Milestone: Communicate Non-Negotiables and Screening Criteria

Description: Provide publishers with clearly defined non-negotiables and screening criteria so that submitted materials meet minimum district requirements before entering the evaluation process.

Milestone: Require Completion of District Evaluation Tool by Publishers

Description: Require publishers to complete the district evaluation tool or provide aligned information to support the review process and ensure consistency in how materials are presented and evaluated.

Milestone: Provide Guidance on Material Formats and Scope

Description: Communicate district expectations regarding material formats, including digital, print, or both, and clarify whether submissions should include core materials only or also supplemental and ancillary resources.



Initial List of State-Adopted Instructional Materials Released: July 31

ADOPTION PHASE

Milestone: Align to State-Adopted Materials List

Description: Review and confirm the state-adopted list of instructional materials released by July 31 to determine which materials will be included in the district review process.

Milestone: Secure Physical Materials and Ensure Public Access (if applicable)

Description: Collect and organize all submitted materials and ensure access is available for reviewers and the public in accordance with established processes.

Milestone: Screen Materials for Eligibility

Description: Review submitted materials against non-negotiables and screening criteria to determine which materials will move forward into the formal evaluation process.

Milestone: Conduct Initial Committee Meeting

Description: Hold the first publicly noticed committee meeting to review the process, expectations, timelines, roles, and responsibilities for all participants, establish norms and protocols for the review process, and determine which materials will move forward for review.

Milestone: Identify Materials for Deeper Review at Initial Public Committee Meeting

Description: During a publicly noticed committee meeting with parent representation present, use screening results to determine which materials will advance for deeper evaluation based on established criteria and scoring thresholds.

Milestone: Train Reviewers on Evaluation Process

Description: Provide formal training on the evaluation tool, scoring protocols, and review expectations to ensure consistent and objective evaluation.

Milestone: Ensure Access to Materials and Platforms

Description: Confirm all reviewers have access to digital platforms and materials and understand how to navigate and use them effectively.

Milestone: Conduct Structured Review and Deep Analysis of Materials

Description: Implement a defined review window during which committee members independently and collaboratively evaluate materials using established criteria and tools, and apply targeted review protocols to shortlisted materials, including usability, differentiation, and assessment alignment, to support deeper analysis beyond initial scoring.

Milestone: Facilitate Publisher Presentations (if applicable)

Description: Coordinate and conduct publisher presentations, ensuring alignment to district expectations and consistency in format and timing.

Milestone: Monitor Review Process and Maintain Consistency

Description: Provide ongoing support, resolve process questions, and ensure fidelity to evaluation protocols and scoring expectations.

Milestone: Conduct Reviewer Calibration Check

Description: Facilitate calibration activities to ensure consistent application of evaluation criteria across reviewers.

Milestone: Collect and Synthesize Stakeholder Feedback

Description: Gather and summarize structured feedback from educators, schools, and community members to inform final recommendations and strengthen decision making.

Milestone: Compile and Analyze Evaluation Data

Description: Aggregate scoring results and conduct comparative analysis across materials to identify strengths, gaps, and overall alignment.

Milestone: Conduct Final Public Committee Meeting and Recommendation

Description: Facilitate committee deliberation, finalize recommendations, and present outcomes in a publicly noticed meeting.

Milestone: Conduct Teacher Input or Vote (District Specific)

Description: Facilitate a structured opportunity for teachers to provide input or participate in a vote on recommended materials to inform the final recommendation.

Milestone: Document Evaluation and Decision Rationale

Description: Maintain records of scoring, feedback, and decision making to support transparency and defensibility.

Milestone: Finalize Recommendation for School Board

Description: Prepare and finalize all materials and documentation required to present recommended instructional materials to the school board.

WINTER / EARLY SPRING

ADOPTION PHASE |||||

Milestone: Validate Final Recommendation and Supporting Evidence

Description: Review and confirm the final recommendation, including evidence summaries and rationale, to ensure clarity, alignment, and readiness for public presentation.

Milestone: Develop Board Presentation and Supporting Materials

Description: Prepare board presentation materials, including key findings, justification, and supporting documentation, along with communication tools such as FAQs to support stakeholder understanding.

Milestone: Prepare for Implementation Planning

Description: Develop initial implementation planning materials, including pacing guides, lesson plans, and rollout plans, to ensure readiness for implementation at the beginning of the next school year.

Milestone: Conduct 20-day Public Review Period

Description: Post links to recommended instructional materials and provide access for public review over a 20-day period prior to the Open, Public Hearing to allow stakeholders to examine materials and provide feedback.

Milestone: Conduct Public Hearing at School Board Meeting

Description: Hold an open public hearing during a school board meeting to receive and consider feedback from stakeholders on the recommended instructional materials.

Milestone: School Board Approval of Recommended Instructional Materials

Description: Confirm the official approval of selected instructional materials and document the final decision.

Milestone: 30-day Objection Period

Description: Provide a 30-day period following board approval during which stakeholders may submit formal objections to specific instructional materials, in accordance with established procedures.

Milestone: Conduct Objection Hearing (if applicable)

Description: Facilitate an open, public hearing led by a designated hearing officer to review, consider, and respond to any formal objections submitted during the objection period.

Milestone: Communicate Selection to Schools

Description: Share final selections, rationale, and next steps with schools and stakeholders to support awareness and transition.

SPRING / EARLY SUMMER

IMPLEMENTATION PHASE |||||

Milestone: Complete Procurement Process

Description: Finalize purchasing processes, including contracts, orders, and required documentation, to secure approved instructional materials.

Milestone: Finalize Detailed Implementation Timeline

Description: Develop a detailed implementation timeline outlining key milestones, training sessions, material distribution, and readiness checkpoints leading into the new school year.

Milestone: Communicate Implementation Expectations to Schools

Description: Provide clear guidance to schools outlining expectations for use, pacing, and instructional priorities to ensure consistent implementation.

Milestone: Deliver Professional Learning for Educators

Description: Provide targeted professional learning to teachers and instructional staff on effective use of the selected materials, including instructional shifts, pacing, and lesson design.

Milestone: Train School and District Leaders

Description: Prepare school leaders, coaches, and district staff to support implementation through training on expectations, monitoring practices, and instructional look-fors.

Milestone: Distribute Instructional Materials and Access

Description: Ensure all materials, both print and digital, are delivered and accessible to teachers and students prior to the start of the school year.

Milestone: Launch Start-of-the-Year Readiness Check

Description: Conduct a readiness check prior to the start of the school year to confirm materials access, teacher preparedness, and system alignment

Milestone: Provide Ongoing Implementation Support

Description: Establish structures for ongoing support, including coaching, availability, and troubleshooting to address challenges during initial implementation.

LATE SUMMER / FALL

IMPLEMENTATION PHASE |

Milestone: Establishing Monitoring and Feedback Processes

Description: Develop processes to monitor implementation fidelity and collect feedback from educators to inform adjustments and continuous improvement.

Milestone: Align Assessments and Instructional Resources

Description: Ensure district assessments, supplemental resources, and instructional supports are aligned to the adopted materials to maintain coherence across the system.

Milestone: Refine Implementation Based on Feedback

Description: Use monitoring data and stakeholder feedback to adjust supports, professional learning, and resources to improve implementation over time.