

Designing and Using Screening Criteria to Narrow Instructional Materials



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PURPOSE

Screening is an early step in the instructional materials adoption process used to **narrow a broad set of options to a smaller group for deeper evaluation.**

It is not designed to identify the “best” program. Instead, screening helps districts:

- ▶ Eliminate materials that do not meet essential requirements
- ▶ Focus time and resources on the most viable options
- ▶ Create a more efficient and rigorous review process

Screening typically occurs before deep evaluation and supports the goal of identifying **2–3 high-quality programs** for further review.

Key Idea: Use Screening Results to Narrow Options

Screening is a filtering and sorting process.

Use:

- ▶ **Non-negotiables** to eliminate misaligned programs
- ▶ **Priority criteria** to differentiate among remaining options

The goal is to reduce the number of programs to a manageable set for deeper evaluation.

CRITERIA DEVELOPMENT

Write Clear, Objective, and Differentiating Screening Criteria

The strength of a screening process depends entirely on the strength of the criteria used.

What Strong Screening Criteria Must Do

Effective screening criteria:

- ▶ Result in a **clear yes or no answer**
- ▶ Are **objective and evidence-based**
- ▶ **Differentiate** between materials

If a criterion does not meet all three conditions, it will not function effectively in screening.

Test Your Criteria

Use these questions to evaluate quality:

- ▶ Could two reviewers reasonably defend different answers?
- ▶ Are any terms vague or open to interpretation?
- ▶ Would most materials receive the same response?

If the answer to any of these is yes, revise the criterion.

Examples and Non-Examples

Examples (Strong Criteria)

- ▶ Includes interactive AI-supported features for student engagement
- ▶ Includes assessment items that mirror state assessment formats

Why these work:

They are specific, observable, and lead to consistent responses.

Non-Examples (Weak Criteria)

- ▶ Digital educator access is user-friendly
- ▶ Misconception guidance is relevant

Why these do not work:

They rely on subjective interpretation and do not produce consistent or reliable results.

Strengthen Weak Criteria

- ▶ Replace vague language with specific, observable features
- ▶ Define what success looks like in practice
- ▶ Ensure responses are based on evidence, not opinion

Example Revision

- ▶ Weak: Digital educator access is user-friendly
- ▶ Stronger: Teachers can access all core instructional materials within three clicks from the main dashboard

Identify and Classify Types of Screening Criteria

Not all criteria serve the same purpose. Strong screening tools include two distinct types.

Define Non-Negotiables (Deal-Breakers)

Non-negotiables are criteria that must be met for a program to continue in the process.

If a program does not meet a non-negotiable, it is eliminated.

These are typically limited in number and often relate to:

- ▶ Technology compatibility
- ▶ District infrastructure requirements
- ▶ Grade-level or course coverage

Key Consideration:

If everything else about a program is strong, but this is missing, would you still move it forward?

If the answer is no, it is likely a non-negotiable.

Identify Priority Criteria (Differentiators)

Priority criteria are important but not eliminatory. They help distinguish between programs that meet basic requirements.

These often relate to:

- ▶ Alignment to standards and major work
- ▶ Support for mathematical thinking and discourse
- ▶ Assessment quality and alignment
- ▶ Usability for teachers and students

Failure to meet these criteria does not automatically eliminate a program, but it impacts how it is prioritized.

Refine and Prioritize Screening Criteria

Before using a screening tool, districts should refine and organize their criteria.

Refine Criteria for Clarity and Strength

Start with a broad set of criteria, then:

- ▶ Identify the strongest criteria
- ▶ Revise those that are unclear or subjective
- ▶ Ensure each criterion meets the standard of being clear, objective, and differentiating

Limit and Define Non-Negotiables

Non-negotiables should be used sparingly.

A typical range is **5–10 criteria**.

Too many non-negotiables can eliminate viable options unnecessarily.

Prioritize Remaining Criteria

Sort remaining criteria by level of importance:

- ▶ High priority
- ▶ Medium priority
- ▶ Lower priority

This ensures that all criteria are not treated equally when making decisions.

CRITERIA APPLICATION

Design the Screening Process

Once criteria are established, districts must determine how screening will be conducted.

Use Screening Data to Sort Materials

Screening criteria can be embedded into publisher questionnaires as part of the request for proposal (RFP).

This allows districts to:

- ▶ Collect consistent information across programs
- ▶ Compare materials based on aligned priorities
- ▶ Sort materials efficiently before deeper review

Define an Approach for Applying Screening Criteria

Districts may define their own process for applying screening criteria. Here are two example processes.:

1. Pre-Meeting Screening

- ▶ Leadership reviews responses in advance
- ▶ Materials are pre-sorted before the committee meets
- ▶ Final recommendations are made by a leadership team prior to a meeting with the review committee
- ▶ The review committee finalizes the decision

2. Committee-Based Screening

- ▶ Screening data analysis occurs during a review committee meeting
- ▶ Committee members analyze and sort materials together
- ▶ Decisions and final recommendations are made collaboratively

Regardless of approach, districts should:

- ▶ Establish decision-making processes in advance
- ▶ Anticipate potential questions or sticking points
- ▶ Ensure transparency in how decisions are made
- ▶ Clearly define roles and authority

Ensure Transparency and Compliance

Eliminatory decisions must be:

- ▶ Conducted in publicly noticed meetings when required with all required participants
- ▶ Transparent and clearly documented
- ▶ Defensible to stakeholders, including families and community members

Plan for Implementation Early

Screening decisions have direct implications for implementation.

As criteria are defined, consider:

- ▶ Which criteria require no change to current practice
- ▶ Which require minor adjustments to instructional practices
- ▶ Which require significant shifts in instruction or systems

Identifying these implications early allows districts to:

- ▶ Prepare for implementation challenges
- ▶ Align professional learning and supports
- ▶ Ensure smoother adoption and rollout

FINAL THOUGHT

Strong screening processes do more than narrow options. They clarify priorities, strengthen decision-making, and create alignment between instructional vision, materials, and implementation.

When designed well, screening ensures that the programs moving forward are not just viable, but positioned to support meaningful instructional improvement.