Developing an Instructional Material Manual For Your District
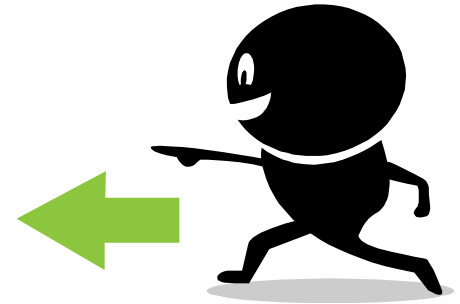
IMCAT

December 2015

What is a Procedure Manual?

1. A tool to communicate state law and district policies
2. Documentation of duties, responsibilities and expectations
3. Convenient way to store records and commonly used forms

# Why, When, How

1. **Why?**
   - Ensure consistency and understanding of expectations
   - Create a one stop place for information
   - Information for new staff unable to attend trainings
   - Help answer questions when you are unavailable
2. **When?**
   - Plan during slow time
   - Set a completion date for yourself
3. **How?**
   - Think about who will use it – AP's, data clerks, etc., get feedback on what they want or need in manual
   - Use terms consistently and define IM specific verbiage
   - Update annually or when changes from SBOE, TEA, or District initiatives occur
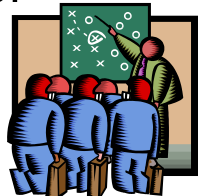
Research and Review

1. Does your district already have one? If so is it up to date?
2. Get examples from other districts
3. Check current SBOE and TEA rules
4. Review current Board local and legal policies
5. Have campus input
6. Make sure you have the most up to date information
7. What problems and questions frequently come up in your district?

Designing your manual

1. Make it easy to locate information, organize so users can easily find answers to questions.
2. Use tabs or dividers
3. Distinguish it from other binders
4. Make copies of pages that can be pulled out and used
5. Address commonly asked questions
6. Post digital copy on district website
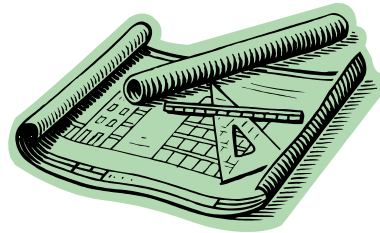
Writing

1. Keep it simple
2. Keep it on task
3. Keep it engaging
4. Keep it consistent
5. Keep it relevant
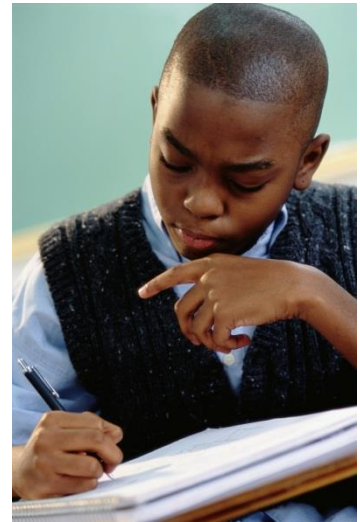
So you think you're done?
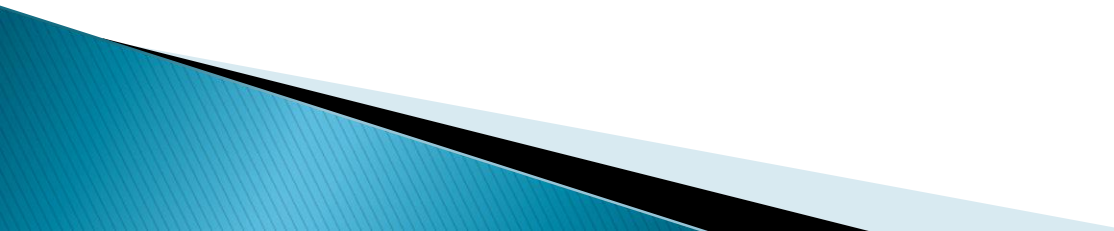
1. Proof-Reading-have someone from another department proof read for clarification
2. Spell & Grammar check
3. Table of contents
4. Definition of terms used

Distributing

1. **Deliver by hand to campuses?**
   - Opportunity to ask or answer questions
   - Check out bookroom
2. **Distribute at a meeting?**
   - Everyone receives the same info at the same time
   - Questions answered to all
3. **Posting digital copy on district website**
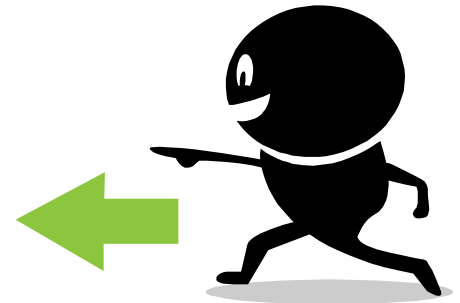
Example of Index

- Instructional Materials & Board Policies
- Textbook tracking Manual
- Audit Info & Adoption Cycle
- Sample Forms & Misc. Info
- TEA Updates & TEA Code 31.104(d)
- Trainings
- Requisitions & Adjustments
- Audit & Invoices

Examples of what to include

1. Coordinator manual
2. Component list
3. Current inventory
4. Adoption cycle
5. Paperwork documenting distributions or transfers
6. Audits & Invoices
7. Campus Calendar
8. Sample forms
9. Textbook management software trainings
10. Copies of Board policies
11. Updates from TEA / TEA Code 31.104

Examples of Processes

Workbook order process

- DIRS will e-mail workbook order forms to appropriate IM coordinators for approved workbooks to be offered to campuses for ordering.
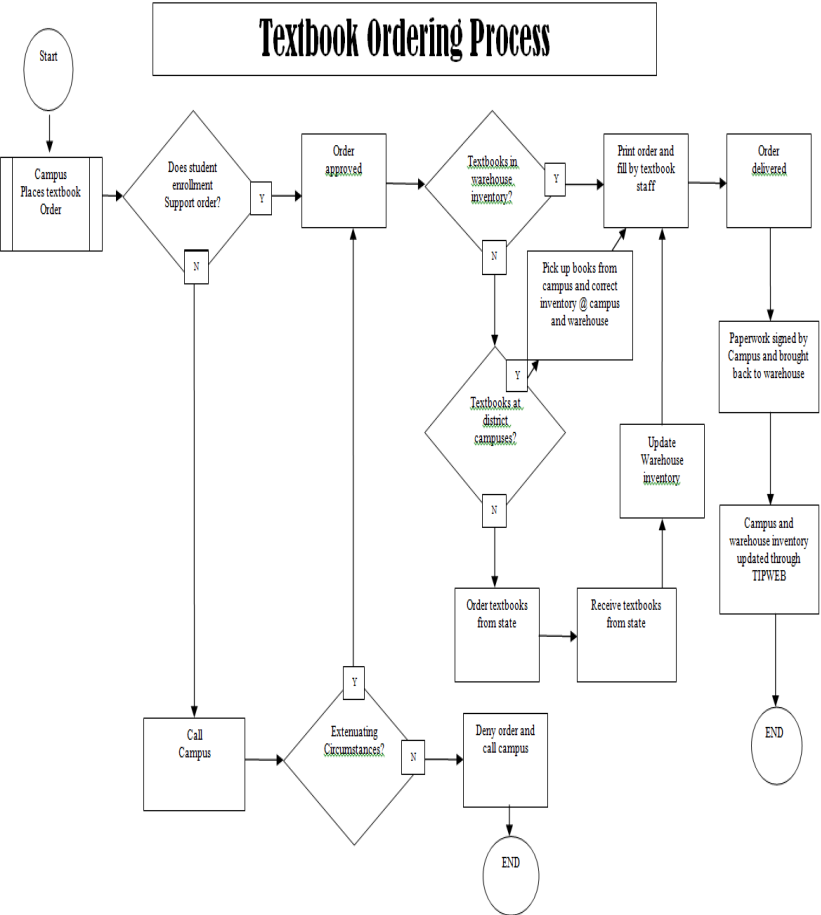- Campus IM coordinators fill in the quantity needed and e-mail back to the DIRS no later than the due date given on the order form.
- The DIRS will place workbook orders with the publishers and request May ship dates.
- Campus IM coordinators are responsible for verifying the titles and quantities received. Any discrepancies are to be noted on the packing slip or pick ticket, a copy made and sent to the DIRS, where the DIRS will contact the publisher.
- Workbooks ordered by the campuses are the responsibility of that campus and will be stored at that campus only. Workbooks ordered and not used, will be the campuses responsibility to either have the publisher pick them up or to recycle them at their campus.

Campus annual order

- Campus IM coordinators place an annual order in Tipweb no later than the last day of June for additional IM needed for the upcoming school year based on the following information:
- Enrollment forecast
- Teachers forecast
- Course/scheduling changes
- Once verification is made that a campus is eligible for the materials ordered, the order will be processed as quickly as possible by the warehouse. Any items placed on backorder will be sent to the campus once shipments from the suppliers are received and processed.
- Campus IM coordinators are responsible for verification of the titles and quantity of IM received. All discrepancies must be noted on the pick ticket and by completing the Missing Instructional Materials form in Eduphoria. A campus has 10 days from the date of the delivery to report any discrepancies. All orders that are not received in Tipweb-IM by campuses after 10 days will be automatically received by the DIRS and any discrepancies will be the cost of the campus.

Examples of Flow Charts

Textbook Ordering Process

Start → Campus Places textbook Order → Does student enrollment Support order? → Y → Order approved → Textbooks in warehouse inventory? → Print order and fill by textbook staff → Order delivered

Does student enrollment Support order? → N → Call Campus

Textbooks in warehouse inventory? → N → Pick up books from campus and correct inventory @ campus and warehouse

Textbooks at district campuses? → Y / N → Order textbooks from state → Receive textbooks from state → Update Warehouse inventory

Extenuating Circumstances? → Y / N → Deny order and call campus → END

Call Campus → Extenuating Circumstances?

Order delivered → Paperwork signed by Campus and brought back to warehouse → Campus and warehouse inventory updated through TIPWEB → END

SUPPLEMENTAL TEXTBOOK ORDER 10 10 12

START → ADDITIONAL BOOKS NEEDED → N → END
ADDITIONAL BOOKS NEEDED → Y → ORDER SENT TO DISTRICT IN TIPWEB → IN WAREHOUSE → N → IN CAMPUS LOCATION → N → PURCHASE APPROVED → N → END

IN WAREHOUSE → Y → DIRS APPROVES ORDER IN TIPWEB → DELIVERED TO CAMPUS (SIGNED RECEIPT SENT TO DIRS) → WAREHOUSE INVENTORY UPDATED IN TIPWEB → ORDER CORRECT → Y → END
ORDER CORRECT → N → DIRS CONTACTS WAREHOUSE FOR ADJUSTMENT → NOTIFY DIRS

IN CAMPUS LOCATION → Y → DIRS REQUESTS BOOKS FROM CAMPUS → CAMPUS CREATES ADJUSTMENT AND WORK ORDER → DISTRIBUTION PICK UP AND DELIVER BOOKS (SIGNED RECEIPT SENT TO DIRS) → DIRS UPDATES TIPWEB → END
DIRS CONTACTS VENDOR FOR ADJUSTMENT

PURCHASE APPROVED → Y → DIRS PLACES ORDER → ORDER DELIVERED TO DISTRIBUTION → BOOKS LABELED AND BARCODED → BOOKS DELIVERED TO CAMPUS (SIGNED RECEIPT SENT TO DIRS) → ORDER CORRECT → Y → END
ORDER CORRECT → N → NOTIFY DIRS

Examples of Procedure Manual

Keller Independent School District

Instructional Materials Procedure Manual

Table of Contents

Campus Textbook Coordinator

Campus IM coordinators are responsible for processing and issuing of IM to the students and staff, and communication with the DIRS.

Campus IM coordinator responsibilities are as follows:

- Ensure all Instructional Materials are labeled with ISBN and accession numbers.
- Require regular IM book checks to be conducted.
- Receive and check shipments of IM to campus.
- Distribute and collect all IM to students and campus staff using the Tipweb system.
- Ensure when returning teacher ancillary materials that all items are returned.
- Maintain accurate records and copies of all pick tickets (shipments), call tags (returns), copies of audits and copies of paid invoices.
- Return all IM to DIRS for classes that will not continue next school year.
- Report any IM that needs to be replaced due to destruction or normal wear.
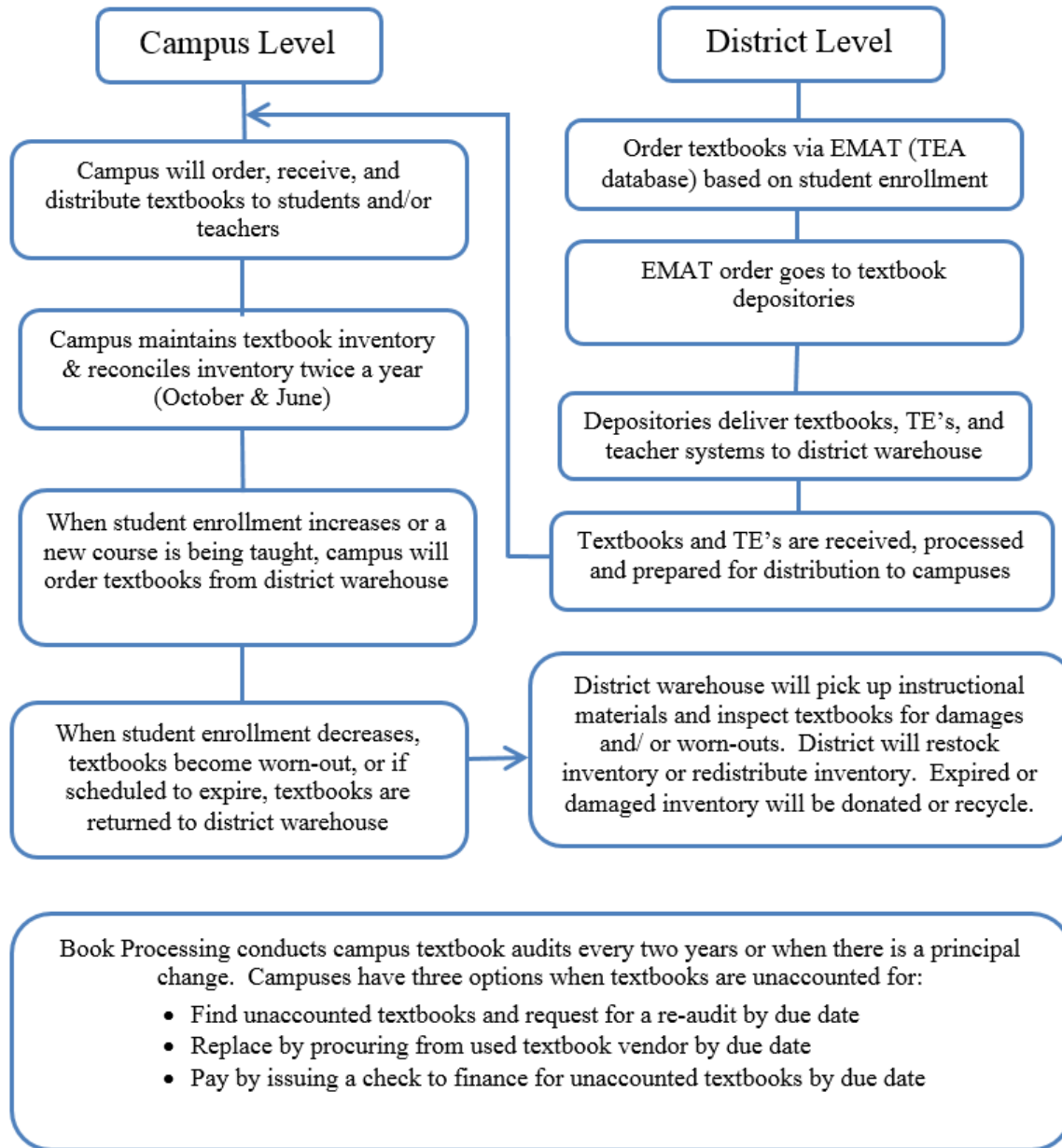
Examples from Adoptions & Audits

	Budget Year 2014	Budget Year 2015
2014–2015 Biennium	**Proclamation 2013 (Not Issued)**	**Proclamation 2014** State Adoption, Fall 2013 Materials Ordered, Spring 2014 Implementation, 2014–2015 School Year ▪ Science, K–12 ▪ Math, K–8 ▪ Technology Applications
	Budget Year 2016	**Budget Year 2017**
2016–2017 Biennium	**Proclamation 2015** State Adoption, Fall 2014 Materials Ordered, Spring 2015 Implementation, 2015–2016 School Year ▪ Social Studies, K–12 ▪ Math, 9–12 ▪ Fine Arts	**Proclamation 2016 (Not Issued)**
	Budget Year 2018	**Budget Year 2019**
2018–2019 Biennium	**Proclamation 2017** State Adoption, Fall 2016 Materials Ordered, Spring 2017 Implementation, 2017–2018 School Year ▪ Career and Technical Education ▪ Languages Other Than English ▪ Special Topics in Social Studies	**Proclamation 2018** State Adoption, Fall 2017 Materials Ordered, Spring 2018 Implementation, 2018–2019 School Year ▪ English Language Arts and Reading, K–5 ▪ Prekindergarten Systems
	Budget Year 2020	**Budget Year 2021**
2020–2021 Biennium	**Proclamation 2019** State Adoption, Fall 2018 Materials Ordered, Spring 2019 Implementation, 2019–2020 School Year ▪ English Language Arts and Reading, 6–12 ▪ Health Education ▪ Physical Education	**Proclamation 2020** State Adoption, Fall 2019 Materials Ordered, Spring 2020 Implementation, 2020–2021 School Year ▪ To be determined

Textbook Audit Procedures

- Materials audited for 2014-2015 will be Student editions and EVI (Large print & Braille) ONLY.
- A separate electronic audit for Teacher Editions will be sent; campuses will fill in counts and submit to district, they will not be audited by the district.
- Complementary copies need to stay in classrooms or stored in a different location
- Inventory Control forms need to be posted, one for each title prior to audit with all information filled in including campus counts. If forms are not posted with counts, the audit will be reschedule once forms are posted. Directions for using Mail Merge to auto fill in control sheets is attached.
- All textbooks should be located in one area, if in multiple locations please keep all grade levels and/or titles together.
- Lockers, student and teacher desks, cabinets, closets, store rooms, etc. should be checked for additional books prior to audit.
- Textbooks on shelf need to be with 5 spines in and 5 spines out, on the floor-groups of 10 or 20.
- Do not store textbooks with similar covers together (ex. Modern Chemistry and Physics)
- Credit will only be given for complete sets (for multiple volumes, Large Print, and Braille sets).
- Invoices are generated within 3 weeks of the end of audits and are due Mid-September, campuses will need to e-mail the District Instructional Resource Specialist weekly or bi-monthly of any books that have been found or turned in. (Please include title of book and quantity found/turned in), campus inventory will be updated and a new invoice will be sent.

Textbook Cycle

Campus Level

- Campus will order, receive, and distribute textbooks to students and/or teachers
- Campus maintains textbook inventory & reconciles inventory twice a year (October & June)
- When student enrollment increases or a new course is being taught, campus will order textbooks from district warehouse
- When student enrollment decreases, textbooks become worn-out, or if scheduled to expire, textbooks are returned to district warehouse

District Level

- Order textbooks via EMAT (TEA database) based on student enrollment
- EMAT order goes to textbook depositories
- Depositories deliver textbooks, TE's, and teacher systems to district warehouse
- Textbooks and TE's are received, processed and prepared for distribution to campuses
- District warehouse will pick up instructional materials and inspect textbooks for damages and/ or worn-outs. District will restock inventory or redistribute inventory. Expired or damaged inventory will be donated or recycle.

Book Processing conducts campus textbook audits every two years or when there is a principal change. Campuses have three options when textbooks are unaccounted for:

- Find unaccounted textbooks and request for a re-audit by due date
- Replace by procuring from used textbook vendor by due date
- Pay by issuing a check to finance for unaccounted textbooks by due date

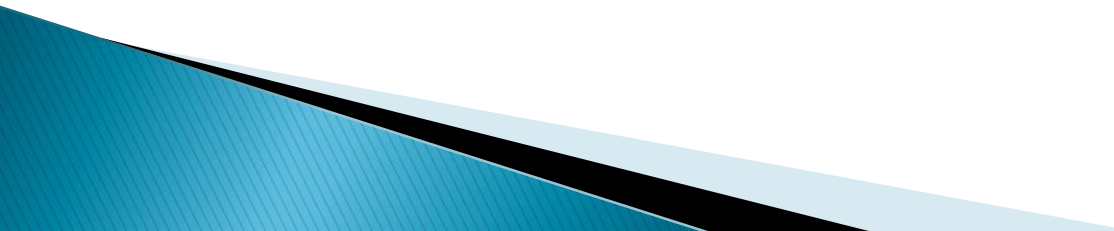## LARGE PRINT AND BRAILLE TEXTBOOKS

The Texas Education Agency's Textbook Division provides large print textbooks for the visually impaired and Braille textbooks for the legally blind. In order for students to have access to these materials requires that the students be certified to the State agency as being either visually impaired or legally blind.

New adoptions for large print and Braille textbooks may take up to six-months for the textbooks to be printed. The Textbook Division at TEA may have textbooks in stock for previously adopted textbooks.

Order the textbooks for the visually impaired and legally blind students just as you would for any student. The core subjects for Braille and Large Type textbooks are in Insignia; if you need a different subject area please call so we can add title to our inventory.

TEA requires the student's name, social security number, date of ARD and the minutes to the ARD. Please mail or fax this information to Book Processing at 289-3800.

Other Topics

- Dual Credit
- Book Covers
- Home Based / Homebound students
- Checking out Instructional Materials to parents
- Online Instructional Materials for students with learning disabilities
- Checking out materials for summer school
- Address staff loss of Instructional Materials
- Assess charges for damaged materials

Tips

- Provide vendor contact information if campuses are allowed to replace lost materials
- Provide visual aids

- Get feed back from campuses
- Keep updated, keep updated, keep updated

Have questions or need help?

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