

# **BETTER AND FAIRER EDUCATION SYSTEM**

## **Submission**

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### **Contact details**

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### **Purpose**

The purpose of this submission is to present a set of recommendations to improve delivery of high-quality instructional materials to schools. The recommendations are based on a critique of subject matter referring to various aspects associated with instructional materials included in the consultation paper published by the Australian Government Department of Education (2023).

The submission begins by providing an overview of my involvement with issues associated with instructional materials, discusses my views concerning subject matter included in reports published by the Australian Government Productivity Commission (2022) and the Australian Government Department of Education (2023), and presents a set of recommendations to improve delivery of high-quality instructional materials to schools. Establishment of an independent organisation to plan, structure and implement a program for analysing instructional materials, improving local decision-making for selecting instructional materials, and providing professional learning to support implementation and use of high-quality instructional materials in schools forms an important element of the recommendations.

### **Background information**

My interest in the role of instructional materials arose in the mid-1980s, while reviewing multicultural and bilingual materials. The review led to a search to identify systems that review instructional materials. The identification of the Educational Products Information Exchange (EPIE) Institute based in New York State, which provided a subscription service to schools for evaluating textbooks, audio-visual equipment, computer courseware and hardware was the most important organisation identified from the search. In 1988 and 1989, I collaborated with ██████████, then ██████████ on the Board of the Australian Schools Catalogue Information Service (ASCIS), to present a submission to the ASCIS Board that the Curriculum Development Centre (CDC) be asked to invite representatives from the EPIE Institute to run a workshop for ASCIS and CDC staff on its processes for evaluating instructional materials. Submission of the proposal occurred at the same time as ASCIS and CDC were amalgamated to form the Curriculum Corporation. Soon afterwards, both ██████████ and I left the Tasmania Department of Education, and the proposal was never considered by the Curriculum Corporation.

After I left the Department of Education, I enrolled at the University of Tasmania for a Master of Education by Research. At the end of 1991, the supervisor, Professor ██████████, resigned from the University of Tasmania. Difficulty in finding a substitute supervisor led to Dr ██████████, then ██████████ of the Centre for Continuing Education at the Australian National University, to assume the role of supervisor. Following his appointment to the University of Canberra in 1996, I completed a Doctor of Philosophy in education under his supervision. The Master of Education by Research thesis, *Selecting Curriculum Resources for Australian Schools: A Review and Analysis of Current Methods and Future Possibilities* can be accessed on the Educational Resources Information Center as ERIC ED 405249. The Doctor of Philosophy thesis, *The Role of Curriculum Resources in Three Countries: The Impact of National Curriculum Reforms in the United Kingdom, the United States of America, and Australia* can be accessed on the Educational Resources Information Center as ERIC ED 490549.

Since graduating in 2004, I have published articles and reports on aspects relating to instructional materials focusing on the U.S.A. and Australia. The following articles were published in the International Association for Research on Textbooks and Educational Media's *IARTEM E-Journal*: 'Research on the textbook publishing industry in the United States of America', *IARTEM e-Journal*, 1: 1; 'Research on the textbook selection process in the United States of America', *IARTEM e-Journal*, 2: 1; and 'Research on textbook use in the United States', *IARTEM e-Journal*, 7: 2, 48-72. In 2019, the International Association for Research on Textbooks and Educational Media published *IARTEM 1991-2016: 25 Years developing Textbook and Educational Media Research* edited by Rodriguez, J. R., Garcia, T. M. B. and Bruillard, E. The article, 'The publishing industry and textbooks: a comparison between the United States of America and Australia' was published in this collected work on pages 281-289. I have published the following reports focusing on standards-based and curriculum reforms in the U.S.A. and Australia. *The Common Core State Standards Initiative: An Overview* can be accessed on the Educational Resources Information Center as ERIC ED 522271. *States' Implementation of the Common Core State Standards and the Australian Curriculum: A Comparison of the Change Process in Two Countries* can be accessed on the Educational Resources Information Center as ERIC ED 557593. *A Comparison of the Change Process in States' and Territories' Implementation of the Australian Curriculum* can be accessed on the Educational Resources Information Center as ERIC ED 581787.

In 2015, I initiated a study to provide a rationale for national organisations, involved in supporting implementation of the Australian Curriculum, to develop a delivery plan to build the capacity of schools in selecting, procuring and using instructional materials that are aligned to the Australian Curriculum. The report, *Aligning curriculum materials with the Australian Curriculum: What is happening in the field and what needs to be done?*, which was presented at the Australian Curriculum Studies Association conference in 2015, can be accessed on the Educational Resources Information Center as ERIC ED 564585.

In March 2016, the report was sent to Senator the Hon. Simon Birmingham, Minister for Education and Training, and the chair of the Australian Education Senior Officials Committee, Mr Ken Davies. Ken Davies distributed it to his colleagues and made it available to the Australian Curriculum, Assessment and Reporting Authority (ACARA) and Education Services Australia (ESA). In September 2017, I met with staff of the Australian Government Department of Education and Training in Canberra. ██████████, reported having discussed the concept of establishing a national service to evaluate

materials with representatives from ACARA and ESA. Officials from the three organisations recognised that it would be timely to proceed with this initiative, since the Australian Curriculum was close to being fully implemented across Australia. An outcome of the meeting was an agreement to develop a proposal for submission to the Education Council. A proposal, however, did not eventuate following the meeting due to the officials' work commitments and subsequent staff changes.

In March 2018, the report, *A Comparison of the Change Process in States' and Territories' Implementation of the Australian Curriculum*, was disseminated to federal, state and territory ministers for education. South Australia's Minister for Education and Chair of the Education Council, John Gardner, referred the report to [REDACTED] of the South Australia Department of Education. A meeting was arranged with [REDACTED], the Department of Education's [REDACTED], when I visited Adelaide in August 2018. During the meeting, she suggested that it would be appropriate to initiate further communications with officials from the Australian Government Department of Education and Training and ACARA about developing a proposal for submission to the Education Council, once the new National School Reform Agreement had been released.

In 2019, I reviewed the National School Reform Agreement with particular reference to state and territory bilateral agreements to identify curriculum-related initiatives being undertaken between 2019 and 2023. The report, *The National School Reform Agreement: Its Implications for Curriculum Reform*, which was presented at the Australian Curriculum Studies Association conference in 2019, can be accessed on the Educational Resources Information Center as ERIC ED 599088.

In May 2019, I contacted the Melbourne-based educational research and consulting group, Learning First, as part of the study on policymaking that led to the National School Reform Agreement. Prior to this contact, Learning First had collaborated with Dr [REDACTED], former New York commissioner of education and currently director of the [REDACTED], on a series of case studies focusing on curriculum as a reform lever. In May 2019, representatives from Learning First travelled to Baltimore to meet with curriculum experts from the Johns Hopkins Institute for Education Policy, Achievement Network, EdReports, StandardsWork and TNTP to discuss how curriculum support in the American education system could be applied in Australia. Representatives from Learning First, who attended the meeting, provided input on that organisation's curriculum research in Australia.

Following the meeting, Learning First staff explored issues relating to defining quality in instructional materials, an effective review process, how schools identify and procure materials and how schools support implementation of materials. In June 2019, I engaged with Learning First staff in discussing these issues by email, a telephone call and exchanging papers exploring these topics. In August 2019, I visited the Learning First office at Collingwood to meet with Learning First staff. The discussion focused on a proposed project consisting of three stages: identify materials used in a sample of schools; develop a rubric to evaluate materials; and engage stakeholders in developing a plan to implement high-quality materials in schools. However, this plan failed to proceed due to restrictions arising from the coronavirus pandemic and failure to engage a funder for the project.

In December 2021, a former staff member of Learning First reported on my consultative work with Learning First to education staff of Grattan Institute. At that time, they were working on a report about quality curriculum and how governments should support its implementation. After an initial conversation by telephone with education staff members, [REDACTED], I was engaged as a consultant for a forthcoming project focusing on the role of instructional materials in curriculum planning. In March 2022, I reviewed and commented on the questionnaire they proposed using to survey school leaders and teachers on their use of instructional materials in curriculum planning. In September 2022, I reviewed and commented on the draft report authored by Hunter, Haywood and Parkinson (2022).

Beginning in May 2022, I engaged with Springer Nature, publisher of Australian Curriculum Studies Associations' journal, *Curriculum Perspectives*, about the publication of a book. Springer Nature invited suggestions of ideas for books, and since I had a topic in which I have relevant documentation, I worked with an education editor to develop a plan for the book. The plan was submitted to a panel of three reviewers, who were generally positive. After revising the plan based on the reviewers' comments, I signed a contract with Springer Nature in May 2023 to produce a book titled *The Role of Instructional Materials in Schools: Publication, Selection and Use in the USA and Australia*.

### **Review to inform a Better and Fairer Education System: Consultation Paper**

The following commentary discusses subject matter, outlined in reports published by the Australian Government Productivity Commission (2022) and the Australian Government Department of Education (2023), which refers to the role of instructional materials in the educational process.

In Chapter 3, the authors of the report, published by the Australian Government Department of Education (2023), believe that small group tuition by a teacher, assistant or tutor is effective when integrated into a whole-school approach using a multi-tiered system of supports. Successful implementation of this model requires the use of high-quality instructional materials. Teachers, however, experience significant challenges in developing high-quality instructional materials. Therefore, new solutions need to be found to overcome this impediment. The authors suggest that governments could increase the availability of high-quality instructional materials, which teachers could adopt (pages 17-18). However, the authors fail to take sufficient account of the complex set of variables operating between publishers, selectors and consumers within Australia's materials' marketplace. It seems unlikely that governments could increase the availability of instructional materials without modifying the interaction of variables operating between publishers, selectors and consumers within Australia's materials' marketplace.

A study commissioned by the Australian Publishers Association provides the most recent account of key variables affecting procurement of instructional materials by schools. Horsley (2012) reported that the current process for procuring materials is complex, because schools use three systems for purchasing materials: book-list; book-hire; or class-set. Funds available to schools for purchasing materials vary according to state, socioeconomic status, sector, level and the material's medium. Schools operating book-hire and class-set systems fund the purchase of materials from global budgets, but each state uses a different formula for determining school budgets. Global budgets of schools are also affected by each school's capability to source additional funds through levies, the activities of parent groups, and grants

from federal and state governments. In all states, except Victoria, book-list systems are largely confined to independent schools. Victoria, however, operates a book-list funding system that caters for all secondary schools. In other states, schools using book-hire and class-set systems are predominantly public and Catholic systemic schools. Many more primary schools than secondary schools operate book-hire and class-set systems. Since publishers' sales of materials to each student in primary schools are almost half of each student in secondary schools, primary teachers have less access to materials, except for literacy and numeracy materials. The complex nature of funding for procuring materials has led to inequity in the provision and delivery of materials to teachers in classrooms reflected in the following findings. In spite of an increase in the aggregated nominal sales by publishing companies from \$39.89 per student in 2000 to \$46.76 per student in 2006, sales had fallen to \$44.00 per student in 2010. The aggregated nominal sales by publishing companies per secondary student were approximately twice the amount for each primary student. Aggregated nominal sales by publishing companies per student also showed variations across states and territories. The book-list system used in Victoria led to more than twice the funds being spent per secondary student on materials purchased from publishing companies. Sales in other states and territories, in particular the Northern Territory, South Australia and Tasmania, were substantially less, because their schools used book-hire and class-set systems extensively. As well as leading to schools holding outdated materials, book-hire and class-set systems fail to deliver adequate supplies of materials to schools. A sample of principals reported in interviews that decisions about the purchase of materials were usually made in the context of strategic planning that required input from the school community. Usually teachers submit an itemised request for materials, which is then considered by a committee charged with funding such purchases.

In Chapter 4, the authors of the Australian Government Department of Education (2023) believe that a common bank of high-quality instructional materials should be created to reduce teacher workload and an independent entity should be established to evaluate instructional materials to ensure that teachers are confident that instructional materials are of high quality and aligned to the Australian Curriculum (page 30). The authors, however, fail to define in the report what constitutes a common bank of high-quality instructional materials. It could mean mandating a national or state lists of adopted materials from which schools are required to select materials or requiring school-based selection committees to develop collections of materials, which teachers are required to use in classrooms. This concept needs definition to clarify how it relates to current processes used in Australian schools to select, adopt and procure instructional materials. Its definition would clarify implications for improving existing practices used in schools to select, adopt and procure instructional materials.

Evidence from studies, which used historical research method to investigate the procurement, selection and use of textbooks and basal readers in the nineteenth and early twentieth centuries, indicates that practices shifted from using instructional materials as a means to control the content of the curriculum for schools in Australian colonies towards decentralising decision-making to schools in the mid-twentieth century. Studies reported by Vick (1988), Fletcher (1990) and Musgrave (1997) discuss how boards purchased and imported these texts from Ireland, issued approved lists of texts and maintained depositories for distributing texts to schools. State departments of education, founded in the late nineteenth century, published texts or contracted publishing companies to produce textbooks and basal readers for approved lists. In the late 1960s, the curriculum reform movement led to collaboration between the states on curriculum development, and the growing influence of school-based curriculum development in the 1970s decentralised decision-making authority for procuring, selecting and adopting instructional materials to schools. The findings of research studies reported by Marsh, Willis,

Newby, Deschamp and Davis (1981), Chris Cooper-Brown and Associates (1994) and Watt (1994) show that instructional materials are selected in each school by curriculum coordinators, resource specialists and teachers working in groups or individually. Authority for adoption of materials, selected by these groups or individuals, has been conferred on principals, although they are often not highly involved in the decision-making process. Instead, adoption of materials is often delegated in a high proportion of schools to curriculum coordinators, either individually or as part of a group. Selection processes used today in Australian schools are decentralised, highly differentiated, unsystematic and dependent on demographic characteristics, such as the size of the school, whether it is located in an urban, suburban or rural area, its socioeconomic status, and the attitudes of influential participants in the decision-making process. Planned, systematic intervention to change the prevailing processes for procuring, selecting and adopting instructional materials is likely to be extremely difficult, because of their complexity, decentralised and unsystematic natures, and dependence on local variations.

The Australian Government Productivity Commission presents a more detailed description of elements for a repository of data on high-quality instructional materials. In the study report, the Australian Government Productivity Commission (2022) recommends that governments should develop an accessible, trusted national portal of evaluative information on instructional materials (pages 41 and 165). Furthermore, instructional materials should be curated by organisations with relevant expertise, such as ACARA, ESA or the Australian Education Research Organisation (AERO), include whole-school curriculum plans and lesson plans, evaluate high-quality instructional materials produced by publishing companies and include professional development to support implementation and use of instructional materials (page 197).

Previously, policymakers applied a similar model to design the National Digital Learning Resources Network. In March 2000, the Ministerial Council for Education, Early Childhood Development and Youth Affairs authorised the Conference of Education System Chief Executive Officers to oversee the Schools Online Curriculum Content Initiative over three phases. The first phase involved conducting a series of feasibility studies and reaching agreements between partners participating in the initiative. The second phase involved renaming the initiative the Learning Federation, determining six priority areas of Science, Mathematics and Numeracy, Literacy for students at risk, Studies of Australia, Innovation, Enterprise and Creativity, and Languages other than English that encompassed 25 projects undertaken between July 2001 and June 2006. The third phase involved building a sustainable supply of online curriculum content between July 2006 and June 2009. At the end of the third phase, the initiative was renamed the National Digital Learning Resources Network and its management was transferred to ESA. Since 2010, ESA has expanded the repository of digital resources, aligned the digital resources to the Australian Curriculum, used an online platform, the Schools Online Teaching and Learning Environment (Scootle) to deliver the digital resources to teachers across Australia, and established Scootle Community, an online social networking tool to support teachers exchange information and ideas about the Australian Curriculum.

## **Recommendations**

The purpose of this section is to build on recommendations presented in reports published by the Australian Government Productivity Commission (2022) and the Australian Government

Department of Education (2023) by outlining a set of recommendations that relate to improving the delivery of high-quality instructional materials as they proceed through publishers' production and marketing strategies, committees' selection processes, and consumers' patterns of use. The recommendations refer to the roles of key actors in the delivery chain: policymakers; publishers; selectors; teachers; and learners.

### *Policymakers*

Policymaking in education is managed through a forum of ministers for education represented by a series of councils. A permanent council of federal and state ministers for education, the Australian Education Council, was founded in 1936. In 1993, the Australian Education Council amalgamated with the Youth Ministers' Council to form the Ministerial Council on Education, Employment, Training and Youth Affairs. In July 2014, the Education Council replaced the Ministerial Council on Education, Employment, Training and Youth Affairs. In July 2021, the Education Ministers Meeting replaced the Education Council.

Policymakers should establish a working group, representing key actors in the materials' marketplace, to oversee and facilitate the following recommendations intended to expand policymaking by including stakeholders from various interest groups.

### **Recommendations for policymakers**

Recommendation 1: Policymakers should establish a working group charged with developing a national strategy for delivering high-quality instructional materials aligned to the Australian Curriculum to schools.

Recommendation 2: The working group should commission AERO to conduct a study to investigate factors operating in the materials' marketplace that affect production, selection and use of high-quality instructional materials.

Recommendation 3: The working group should convene a forum of representatives from the education and publishing sectors to develop a delivery plan that improves production, selection and use of high-quality instructional materials.

Recommendation 4: The working group should appoint an expert committee to plan, structure and implement a program for analysing instructional materials, improving local decision-making for selecting instructional materials, and providing professional learning to support implementation and use of high-quality instructional materials in schools.

Policymakers should establish a working group, representing key actors in the materials' marketplace, charged with developing a national strategy for delivering high-quality instructional materials aligned to the Australian Curriculum to schools. Initially, the working group needs to consider how instructional materials are developed, selected and used in the materials' marketplace. The working group should commission AERO to conduct a study to investigate factors operating in the materials' marketplace. The research design should acknowledge that a complex set of interactions between publishers' production and marketing strategies, selectors' decision-making processes, and consumers' patterns of use governs the materials' marketplace. The study should include a review of relevant research findings in the field, and apply appropriate research methods to investigate publishers' production and marketing strategies, committees' selection processes, and consumers' patterns of use.

The working group should convene a forum of representatives from the education and publishing sectors to promote cooperative work on a range of issues relating to instructional materials. The findings of the study conducted by AERO will help the forum identify whether changes should be made to inaugurate a balanced and coordinated set of activities that will deliver high-quality instructional materials aligned to the Australian Curriculum to schools. The forum should develop a plan to improve delivery of high-quality instructional materials to schools across the country. The locus for decision-making in the selection of instructional materials, the degree of state or local authority over the adoption of instructional materials, the level of content expertise in schools and economies of scale will influence the delineation of various activities for the delivery plan. The delivery plan should identify a delivery chain consisting of a set of actors and interactions among them that improves dissemination of instructional materials to teachers and students. Once the delivery chain has been determined, it is important to identify areas of potential weaknesses. Strengths and weaknesses in the personal relationships among key actors need to be determined. The ease or difficulty in



coordinating the actors needs to be assessed. The sources and flow of funds and resources required to maintain the delivery chain need to be regulated. Mechanisms for monitoring the performance of the actors and identifying encumbrances need to be put in place, which ensure that desired changes occur in the delivery chain. Weaknesses identified in the delivery chain need to be addressed by strengthening relationships or redesigning the delivery chain by removing unnecessary actors or easing the pressure on overburdened actors.

Evaluative data on the quality and alignment of instructional materials to the Australian Curriculum, based on the application of rigorous techniques, is insufficient to help teachers make informed decisions for selecting instructional materials in the Australian educational setting. In spite of this shortcoming, the relatively small size of Australia's materials' marketplace means that innovation to effect change in this field is feasible through innovation. Based on recommendations by the Australian Government Productivity Commission (2022) and Hunter, Haywood and Parkinson (2022), the working group should establish an independent organisation for this purpose. The working group should appoint an expert committee to plan, structure and implement a program for the independent organisation. The expert committee should examine programs, which have been planned, structured and implemented in foreign countries.

The author of this submission recommends that the expert committee should consider the program offered by EdReports, a non-profit organisation founded in the USA to undertake work in this field on a national basis, from the perspective of providing a model suitable for adaptation to the Australian setting. The Appendix presents the first draft for a case study on EdReports to be included in a forthcoming book titled *The Role of Instructional Materials in Schools: Publication, Selection and Use in the USA and Australia*.

The independent organisation will need to incorporate a range of activities in its program, if the recommendation to adapt EdReports's program to the Australian context is adopted. First, the expert committee will need to formulate a plan for the new program, obtain funds to operate the independent organisation, and appoint a governing board and staff for the independent organisation. Second, the independent organisation will need to consult the education community to develop criteria and indicators for rubrics to evaluate instructional materials. Third, the independent organisation will need to recruit a train teacher volunteers from schools and other educational settings to use the rubrics to evaluate instructional materials, and organise volunteers into review panels. Fourth, the independent organisation will need to consult publishers about participating in the program through meetings with review panels, submitting reports on their products, and revising their products based on evaluations produced by review panels. Fifth, the independent organisation will need to create awareness among teachers in schools across the country about evaluations of instructional materials published by the independent organisation. Sixth, the expert committee will need to consult the Australian Institute for Teaching and School Leadership to design a professional development program to improve the selection process used in schools. Seventh, the expert committee will need to initiate contacts with state and territory departments of education to establish partnerships to design state-based projects for selecting and using instructional materials in schools.

### ***Publishers***

Publishers are key actors in the materials' marketplace, because they develop materials that selectors screen and teachers use in their classrooms. Although publishers' decisions about

developing new materials are determined by economic forces operating within the materials' marketplace, adoption and implementation of the Australian Curriculum has influenced publishers to improve the quality and alignment of new products to the Australian Curriculum.

The following recommendations should be considered by the working group to enhance publishers' role in developing high-quality instructional materials aligned to the Australian Curriculum.

### **Recommendations for publishers**

Recommendation 5: The expert committee should consult publishing companies and non-profit organisations involved in producing instructional materials to identify means for publishers to participate in the independent organisation's program to provide advice on the quality and alignment of their products.

Recommendation 6: The working group should commission the Australian Publishers Association to investigate how the annual Awards for Excellence in Educational Publishing could be integrated into the independent organisation's program.

Little is known publicly about the role of publishing companies and non-profit organisations in producing and marketing instructional materials. The findings from the limited research conducted into the educational publishing industry in Australia suggest that its practices derived from the British publishing industry. Australian publishing companies gained a place in response to the market's need for instructional materials that demonstrated Australian content. The advent of American publishing companies within the Australian marketplace from the 1960s was marked by a policy of acquisition. By the 1990s, the Australian publishing industry had become increasingly dominated by a small number of foreign publishing companies, thereby closely reflecting the American materials' marketplace. Wilson (1993) reported that as a result of takeovers in the 1970s and 1980s, each publisher produced a number of imprints representing ownership by a previous company. Textbooks were usually written by teachers and academics contracted by publishers. Publishers conducted market research, displayed materials at conferences, sent sales' representatives to schools, and review copies were distributed throughout the education system. Most states had book-hire systems that allowed schools to buy in bulk and hire materials to students. The expert committee should consult publishing companies and non-profit organisations involved in producing instructional materials to improve collaboration in providing advice to the independent organisation about the quality and alignment of their products.

The Australian Publishers Association has institutionalised the Awards for Excellence in Educational Publishing as an integral and accepted component of the ongoing work of publishing companies. In 1994, the Australian Publishers Association's Schools Educational Publishing Committee and the Teaching Resources and Textbook Research Unit in the Faculty of Education at the University of Sydney established the Awards for Excellence in Educational Publishing to promote and celebrate innovative materials in the marketplace. A judging panel, consisting of members with expertise in primary, secondary and higher education as well as publishing, evaluates the materials submitted for the awards. Originally, the judging panel comprised staff of the Teaching Resources and Textbook Research Unit, primary and

secondary teachers, publishing consultants, tertiary publishers' representatives and the editor of higher education for the national newspaper, *The Australian*. In response to publishers' requests for greater representation, judges have been selected by the Schools and Educational Publishers Committee from publishing companies since 2005. Initially, a subcommittee of the judging panel screens all submitted materials by applying criteria relating to clarity of writing, pedagogical implications, quality of illustrations, representation of the discipline, special features and characteristics, quality of the subject matter content, innovation and flair. From the initial screening, the most meritorious materials are analysed independently by primary, secondary and tertiary panels over a three-week period. On the final day, the three panels convene to decide the winners or shortlisted publications within the categories of student resource, reference resource and teaching resource across three levels: primary; secondary; and technical and further education, vocational education and tertiary. With the advent of digital resources, new categories were included in the awards. Since 1999, the awards have included a technology showcase for the primary and secondary levels, and since 2000 an Australian educational website category awarded across the four levels. Each year, a catalogue of the winners and shortlisted publications, published for the Australian Publishers Association by *The Australian* was disseminated to every school and public library across Australia for the first 15 years. In more recent years, the catalogue has been made available online on the Australian Publishers Association's website to provide guidance for selecting materials.

Studies reported by Horsley (2007), Dargusch, Persaud and Horsley (2011) and Martin (2013) provide evidence that the Awards for Excellence in Educational Publishing have enhanced publishers' role in developing instructional materials and judge the quality of submitted materials accurately. The working group should commission the Australian Publishers Association to investigate how the annual Awards for Excellence in Educational Publishing could be integrated into the independent organisation's program.

### ***Selectors***

Selectors are key actors in any delivery plan, because they screen the materials that teachers implement in their classrooms. As selectors of materials are based in schools, they also influence decisions about adoption and procurement of new materials.

The following recommendations should be considered by the working group to enhance selectors' role in screening and reviewing high-quality materials aligned to the Australian Curriculum.

#### **Recommendations for selectors**

Recommendation 6: The working group should convene a meeting of representatives from the independent organisation and the states and territories to develop a set of guidelines for the decision-making process to assist school-based personnel select high-quality instructional materials aligned with the Australian Curriculum.

Recommendation 7: The expert committee should consult the Australian Institute for Teaching and School Leadership to assist in developing a program for the independent

organisation to improve the selection process in schools by training school-based selectors.

Recommendation 8: The working group should convene a meeting of representatives from the Australian Curriculum, Assessment and Reporting Authority to define criteria for selecting materials to be included in each learning area of the Australian Curriculum.

Little research has been conducted to identify procedures used in the decision-making process for selecting instructional materials. Based on the responses of school personnel in a stratified random sample of Australian schools, Watt (1994) found that most schools use definable selection procedures. In the study, respondents from 82 schools described the main procedure used to select instructional materials in their schools. Respondents' perceptions were classified according to a typology consisting of ten categories for both selection and adoption. In the sample, six types were involved in selecting materials, while nine types were involved in adopting selected materials. The most frequently occurring response for selection, group choice by teachers and the curriculum coordinator in subject departments or curriculum areas, occurred in 37 schools. Although schools using this selection type employed five adoption types, two types were common: individual choice by the curriculum coordinator occurred in 18 schools; and group choice by teachers and the curriculum coordinator occurred in 12 schools. The influence of demographic factors on the types of selection and adoption used in 59 schools, which provided this information, was analysed for interaction in terms of individual or group processes. The analysis showed that the frequency of individual or group processes varied according to the size of the school, type of school, sector and location. In small schools, selection decisions were more often made by individuals and adoption decisions were more often made by groups, but in large schools, selection decisions were more often made by groups and adoption decisions were more often made by individuals. In primary schools, selection decisions were more often made by individuals and adoption decisions were more often made by groups, while in high schools and schools with combined primary and secondary levels, selection decisions were more often made by groups and adoption decisions were more often made by individuals. There was also a higher frequency of selection and adoption decisions involving individuals in private schools and schools in rural communities.

The findings suggest that the decision-making process for selecting and adopting instructional materials is too often governed by informal procedures involving groups and individuals, whose activities are often uncoordinated within the decision-making process. This conclusion indicates a need for defining a reliable and defensible decision-making process involving a sequence of several steps for selecting and adopting instructional materials. Practice confirms that committee structures consisting of broad community representation represents the most appropriate means. The activities of selection committees operating in local communities should be supported by coordination from a central point, an in-service professional development program, pilot testing of new materials, reference to evaluation studies and a public process for displaying new materials.

The working group should convene a meeting of representatives from the independent organisation and the states and territories to develop a set of guidelines for the decision-making process to assist school-based personnel select high-quality instructional materials aligned with the Australian Curriculum. The guidelines should include elements about conducting a curriculum review, specifying screening and review criteria, identifying options for dividing

labour in reviewing materials, combining information and voting on final decisions, permitting publishers to make presentations about their products, permitting citizens to present comments, and specifying procedures for challenges to controversial materials.

Two additional actions should be taken to improve decision-making by school-based personnel in selecting high-quality instructional materials aligned with the Australian Curriculum. The expert committee should consult the Australian Institute for Teaching and School Leadership to assist in developing a program for the independent organisation to improve the selection process in schools by training school-based selectors. The working group should convene a meeting of representatives from the Australian Curriculum, Assessment and Reporting Authority to define criteria for selecting materials to be included in each learning area of the Australian Curriculum.

### ***Teachers***

Teachers are key actors in any delivery plan, because they request new materials as well as implement them in their classrooms. They participate in selecting materials, and influence decisions about adoption and procurement of materials.

The following recommendations should be considered by the working group to enhance teachers' role in selecting and implementing high-quality instructional materials aligned to the Australian Curriculum.

### **Recommendations for teachers**

Recommendation 9: The expert committee should consult states and territories to assist the independent organisation develop a program to train teachers to review instructional materials.

Recommendation 10: The working group should convene a meeting with representatives from the Australian Publishers Association to assist the independent organisation develop a program to provide in-service training of teachers to implement their new products in their classrooms.

Teachers have been employed in several projects to develop and review instructional materials. Beginning in 2011, the Queensland Department of Education, Training and Employment used teams of teachers to develop units for the Curriculum into the Classroom project. Subsequently, the units were reviewed by teachers across the state. Beginning in 2016, the Western Australia Department of Education formed a partnership with Scitech to use teachers to review STEM resource modules. The knowledge and skills that teachers acquire while using instructional materials in classrooms places them in good stead for evaluating instructional materials.

The expert committee should consult states and territories to assist the independent organisation develop a program to train teachers to review instructional materials. The training program should include a process for prospective reviewers to complete an interview and a work sample, prior to selection as a reviewer. Newly recruited reviewers should participate in annual training program to extend their knowledge about the independent organisation's review process and the Australian Curriculum.

The working group should convene a meeting with representatives from the Australian Publishers Association to assist the independent organisation develop a program to provide in-service training of teachers to implement new materials in classrooms. The training program, which could involve publishing companies providing teachers with in-service training to implement their products in classrooms, should include an overview of the product, a demonstration of its use with students, and question-and-answer feedback sessions after the product has been used by teachers.

### ***Learners***

Learners are key actors in any delivery plan, because they are the ultimate consumers of materials. However, learners' experiences with materials are seldom a factor that shapes decision-making by publishers and selectors.

The following recommendations should be considered by the working group to enhance learners' role in the development of and access to high-quality materials aligned to the Australian Curriculum.

### **Recommendations for learners**

Recommendation 12: The working group should convene a meeting of representatives from the Australian Publishers Association to develop guidelines and strategies for publishers to verify new materials with learners and revise the materials based on feedback.

Recommendation 13: The working group should convene a meeting of representatives from the states and territories to identify a strategy for each school to determine annually whether students have sufficient basic materials in the core subjects that are aligned with the Australian Curriculum.

In 1994, the Commonwealth Department of Employment, Education, Training and Youth Affairs funded the Curriculum Corporation to conduct a project to specify guidelines for public agencies and private organisations outside education to follow in developing materials for use in Australian schools. The project consisted of two stages. First, a consulting firm was commissioned to identify the factors affecting the selection and purchase of materials by surveying a sample of Australian schools. Second, the findings of the survey informed the development of a set of guidelines for developers and producers of materials. An outcome of the market research study conducted by Chris Cooper-Brown and Associates (1994) was the specification of guidelines and strategies for trialling materials with students. Published by the Curriculum Corporation (1996), the guidelines consist of eight component parts titled Project Initiation, Project Development and Management, Consultation and Trialling, Content, Production, Take-Up of Materials, Curriculum in Australia, and Why Schools Purchase Materials and Why Teachers Use Them. Intended to include scope for consultation and trialling an instructional material, the third part consists of three guidelines. First, consult relevant authorities. Second, conduct trials with teachers and students. Third, implement ongoing consultation with users of the material.

However, policymakers have not called upon publishers to satisfy consumer demands for high-quality design and content in materials by incorporating procedures for gathering and analysing data obtained from verifying materials with appropriate group of learners, and then revising the materials on the basis of the results. The working group should convene a meeting of representatives from the Australian Publishers Association to develop guidelines and strategies for publishers to verify new materials with learners and revise the materials based on feedback. A research study should be commissioned to examine guidelines and strategies developed in foreign countries.

The failure of book-hire and class-set systems, widely used in schools as a basis for purchasing materials, to deliver sufficient new materials to schools highlights the need to ensure that each learner has sufficient high-quality instructional materials that are aligned to the Australian Curriculum. The working group should convene a meeting of representatives from the states and territories to identify a strategy for each school to determine annually whether students have sufficient basic materials in the core subjects that are aligned with the Australian Curriculum.

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## APPENDIX

### EdReports

#### *Origins and structure*

The difficulty that educators experience in identifying high-quality instructional materials prompted Maria Klawe, president of Harvey Mudd College at Claremont, California, to convene a mathematics strategy group in consultation with Geoffrey Cowan, president of the Annenberg Foundation Trust at Sunnylands in Rancho Mirage, California, to examine opportunities that digital content brings to helping teachers and students become more effective in mathematics education. In 2012 and 2013, the mathematics strategy group, consisting of mathematics educators, digital content specialists, lead writers of the Common Core State Standards (CCSS) and education leaders, held three design meetings and a culminating retreat in the Annenberg Retreat at Sunnylands, where they discussed the need for independent reviews of materials focusing on their alignment to the CCSS and concluded that an entity should be established to pursue this work. Grants were obtained from the Bill and Melinda Gates Foundation, the William and Flora Hewlett Foundation, and the Leona M. and Harry B. Helmsley Charitable Trust to establish a non-profit organisation called EdReports. Education First, a Seattle-based consulting group, which was contracted by the funders to plan the new organisation, worked with Maria Klawe to recruit a board of directors, supported the board of directors in developing a business plan, hired an executive director, housed the organisation, provided technical support and launched a website at [www.edreports.org](http://www.edreports.org).

Since its foundation in July 2014, EdReports has established a middle-sized organisation with grants provided by the Bill and Melinda Gates Foundation, Broadcom Incorporated, Carnegie Corporation of New York, Charles and Helen Schwab Foundation, Charles and Lynn Schusterman Family Foundation, Leona M. and Harry B. Helmsley Charitable Trust, Oak Foundation, Overdeck Family Foundation, Samueli Foundation, Stuart Foundation, and William and Flora Hewlett Foundation. EdReports is governed by a twelve-member Board of Directors, whose members have professional backgrounds in education, finance, law, non-profit management, and marketing and communications.

By 2023, the number of staff members has increased to 48 employees consisting of seven main teams. The partnership team consists of a director, manager, four senior specialists and three specialists. The academic team consists of a chief academic officer, manager academics, academic office manager, senior manager and coordinator. The English language arts team consists of a director, manager, manager partnerships, specialist K-8 and specialist secondary. The mathematics team consists of a director, senior manager, senior specialist and specialist. The science team consists of a director, manager and two specialists. The operations team consists of a senior manager and manager. The knowledge management team consists of a senior specialist and coordinator. Other staff members comprise an executive director, director research and learning, director talent and culture, senior manager digital communications, manager talent acquisition, manager development, manager data systems, manager frontend developer, chief marketing and communications officer, managing editor, content writer and systems manager, senior specialist full stack developer, data strategist, specialist human resources, specialist program strategy, specialist multilingual learners and specialist finance. EdReports is a virtual organisation with staff members working in home offices using

communications technology to support collaboration. Staff members, however, meet at annual retreats as well as board meetings, workshops and reviewer trainings.

### ***Review and selection process***

EdReports maintains a network of more than 300 content reviewers representing education systems in urban, suburban and rural communities across 46 states. After completing an interview and a work sample, prospective reviewers are selected according to depth of content knowledge, experience at evaluation, and ability to participate in face-to-face meetings and virtual conferences, but they must not be affiliated with the publishing industry. Each summer, newly recruited reviewers participate in annual training sessions, which were held in Chicago from 2014 to 2017 and in Minneapolis in 2018 and 2019. At the training sessions, reviewers extend their knowledge about college- and career-readiness standards, the instructional shifts, and the EdReports' review process. Reviewers are paid a stipend at the end of each review. EdReports appoints groups of Klawe fellows annually to develop and implement impact projects to increase the capacity of educators in their communities to identify and implement high-quality instructional materials. Consisting of former and current reviewers, the first group of eight was appointed in November 2019, the second group of 11 was appointed in August 2020, the third group of nine was appointed in November 2021, and the fourth group of seven was appointed in October 2022.

EdReports' staff assessed 11 commonly used rubrics, and observed review processes and training conducted for Achieve and the state of Tennessee to develop a process for reviewing digital and print-based materials. The review process requires materials to meet criteria and indicators set for three successive gateways: alignment to the CCSS or Next Generation Science Standards (NGSS); rigour of the subject matter; and instructional supports and usability. At each gateway, reviewers provide a rating according to numerical rating options and cite concrete evidence in an evidence collection workbook. An overall rating for each criterion is determined by adding the total points earned from rating a material against the indicators. A material that meets expectations moves to the next gateway.

To identify materials for review, EdReports' staff researches the marketplace, accepts recommendations from educators and receives requests from publishers. The review process involves teams of four or five reviewers analysing each material independently and providing evidence through the online system before meeting to reach consensus on the evidence and the score. Review teams are assisted by volunteer advisory panels with expertise in each content area.

Publishers are also involved in the review process. Each publisher is invited to provide an hour-long orientation on the publisher's material to the appropriate review team. Publishers also have opportunities to post a response to a review report in the form of a document providing background information and research findings about the material for publication on edreports.org.

In mid-2019, EdReports' staff surveyed state education agencies, school districts, education organisations, publishers, teachers and researchers to elicit feedback on the current rubrics. EdReports engaged organisations and experts with experience in working with students with learning differences and multilingual learners in conducting an internal audit. Other revisions made to usability criteria addressed technology issues such as data privacy, support for

caregivers, and interoperability with learning management systems. In April 2020, EdReports released modifications to the rubrics used in the review process. Revisions to a small number of indicators, focusing on alignment to the CCSS and rigour of the subject matter, were made to the rubrics for English language arts and mathematics. Revisions to indicators, focusing on instructional supports and usability, were made to the rubrics for English language arts, mathematics and science to address details for student populations that require support for English language acquisition, learner variance, and teacher supports. Reviews using the revised rubrics commenced in mid-2020 with the first rounds of reports published early in 2021.

### *Mathematics*

Early in 2014, EdReports' staff conducted a listening tour to collect information for developing a methodology and a rubric to analyse mathematics materials for kindergarten to grade 8. An Anchor Educator Working Group analysed the feedback and developed *EdReports.org Quality Instructional Materials Tool: K-8 Mathematics* and *K-8 Mathematics Evidence Guides*. Following a calibration exercise to ensure consistency across reviewers, 20 materials for kindergarten to grade 8 were analysed by 47 reviewers. EdReports released the results in March 2015.

Following criticism of the gateway procedure by several publishing companies and release of an open letter by the National Council of Teachers of Mathematics and the National Council of Supervisors of Mathematics outlining concerns about the review process, EdReports released four enhancements to the rubric, methodology and reporting protocol. Then, the review teams analysed the materials again as well as an additional 58 materials. Evaluations of these materials were released on a rolling basis in February, April and May of 2016.

Early in 2015, EdReports conducted a listening tour to collect information for developing a methodology and a rubric to analyse mathematics materials for high school. An Anchor Educator Working Group analysed the feedback and developed *EdReports.org Quality Instructional Materials Tool: High School Mathematics* and *High School Mathematics Evidence Guides*. Late in 2015, 31 reviewers analysed eight mathematics materials for high school. In June 2016, EdReports posted the results on edreports.

In 2015, EdReports released the results for 15 mathematics materials. In 2016, EdReports released the results for another 24 mathematics materials. In 2017, EdReports released the results for another eight mathematics materials. In 2018, EdReports released the results for a further 17 mathematics materials. In 2019, EdReports released the results for a further 16 mathematics materials. In 2020, EdReports released the results for a further 19 mathematics materials. In 2021, EdReports released the results for a further 16 mathematics materials. In 2022, EdReports released the results for a further ten mathematics materials. In 2023, EdReports released the results for a further two mathematics materials.

### *English Language Arts*

In mid-2015, EdReports conducted a listening tour to collect information for developing a methodology and a rubric to analyse English language arts materials for grades 3 to 8. An Anchor Educator Working Group analysed the feedback and developed *EdReports.org Quality Instructional Materials Tool: English Language Arts 3-8 Review Tool* and *3-8 ELA Quality*

*Instructional Materials Tool Evidence Guides*. Late in 2015, 45 reviewers analysed seven English language arts materials for grades 3 to 8. In August 2016, EdReports posted the results on edreports.org.

In 2016, EdReports conducted a listening tour to collect information for developing a methodology and a rubric to analyse English language arts materials for kindergarten to grade 2. An Anchor Educator Working Group analysed the feedback and developed *EdReports.org Quality Instructional Materials Tool: English Language Arts K-2 Review Tool* and *K-2 ELA Quality Instructional Materials Tool Evidence Guides*. Early in 2017, review teams analysed six English language arts materials for kindergarten to grade 2. In April 2017, EdReports posted the results on edreports.org.

In 2017, EdReports conducted a listening tour to collect information for developing a methodology and a rubric to analyse English language arts materials for high school. An Anchor Educator Working Group analysed the feedback and developed *EdReports.org Quality Instructional Materials Tool: English Language Arts High School Review Tool* and *High School ELA Quality Instructional Materials Tool Evidence Guides*. Late in 2015, six review teams analysed six English language arts materials for high school. In August 2017, EdReports posted the results on edreports.org.

A national conversation over the effectiveness of the balanced literacy approach for reading instruction led EdReports to conduct a listening tour to collect information for developing a methodology and a rubric to analyse supplemental materials for foundational skills in literacy. An advisory panel analysed the feedback and developed *EdReports.org Quality Instructional Materials Tool: English Language Arts Foundational Skills Review Tool* and *ELA Foundational Skills Evidence Guides*. Late in 2019, review teams analysed five supplemental materials for foundational skills in literacy. In November 2019, EdReports posted the first reports on edreports.org.

In 2016, EdReports released the results for four English language arts materials. In 2017, EdReports released the results for another 13 English language arts materials. In 2018, EdReports released the results for a further ten English language arts materials. In 2019, EdReports released the results for a further 17 English language arts materials. In 2020, EdReports released the results for another 11 English language arts materials. In 2021, EdReports released the results for a further 12 English language arts materials. In 2022, EdReports released the results for a further five English language arts materials. In 2023, EdReports released the results for a further eight English language arts materials.

## *Science*

In November 2017, EdReports conducted a listening tour involving science education experts to collect feedback that ensured that the vision of the framework, published by the National Research Council (2012), and the NGSS were reflected in a methodology and a rubric to analyse science materials for grades 6 to 8. In January 2018, an Anchor Educator Working Group analysed the feedback and developed *Science Quality Instructional Materials Rubric: Grades 6-8* and *Science Grades 6-8 Evidence Guides*.

From December 2018 to March 2019, EdReports conducted a listening tour involving science education experts to collect feedback that ensured that the vision of the framework, published

by the National Research Council (2012), and the NGSS were reflected in a methodology and a rubric to analyse science materials for kindergarten to grade 5. An Anchor Educator Working Group analysed the feedback, examined existing rubrics and developed *Science Quality Instructional Materials Rubric: Grades K-5* and *Science Grades K-5 Evidence Guides*.

In May 2018, review teams began reviewing the first six science materials. In 2019, EdReports released the results for seven science materials. In 2020, EdReports released the results for another six science materials. In 2021, EdReports released the results for a further five materials. In 2023, EdReports released the results for a further five science materials.

## ***Instructional design***

### *Culturally responsive practices*

In 2021, EdReports commissioned Education First to identify and define key terms to describe culturally-centred theories and models of instruction to better understand the current state of discussion, needs of the field and implications for instructional materials. Education First staff interviewed and facilitated focus group meetings with leaders of state education agencies, districts and charter schools, scanned social media and online forums, and reviewed literature and online resources relating to culturally-centred theories and models. Education First and EdReports (2021) defines terms for culturally responsive pedagogy, culturally relevant teaching and culturally sustaining pedagogy, abolitionist teaching, liberating pedagogical emancipating education, and antiracist teaching, discusses implications for instructional materials, and summarises the current state relating the culturally-centred theories and models.

In an effort to provide information about a range of new criteria designed to assess culturally responsive practices in instructional materials, EdReports' staff analysed 15 rubrics in use in the USA. Rubrics were identified through recommendations from states and districts, and through online searches. A set of questions was used to analyse the rubrics during the review process. EdReports (n.d.) reported that the analysis produced 12 findings to assist readers familiarise themselves with rubrics available to evaluate culturally responsive practices in instructional materials. First, rubrics have two distinct purposes: evaluating materials for inclusion of culturally responsive practices; or informing practice or shifting mindsets regarding culturally responsive practices in materials. Second, rubrics rarely provide user guidance on how to rate materials. Third, a range of definitions are used to describe culturally responsive practices in relation to materials. Fourth, half of the rubrics make explicit connection to a specific research base. Fifth, individual teachers are the primary collectors of evidence for the rubrics to inform their own decisions about materials. Sixth, rubrics rarely mention or provide guidance for review teams, which are often tasked with evaluating and selecting materials. Seventh, more than half of the rubrics refer to resources that support the needs of multilingual learners and culturally responsive practices. Eighth, a limited number of rubrics include guidance that can be used when considering how to meet the needs of students from specific ethnic and cultural backgrounds. Ninth, rubrics vary on how they seek to identify equitable representation in materials and the manner in which evidence is used to describe representation. Tenth, a majority of the rubrics refer to student agency and focus on student choice or social justice. Eleventh, rubrics were evenly split between those that were subject specific and those that were for general use. Twelfth, more than half of the rubrics include criteria that use similar terms to EdReports' usability indicators. The report's authors concluded that inadequacies in the rubrics required developers to take account of gaps identified in the

analysis, rubrics and processes need to be created to better able to assess quality in materials, states and districts that use the rubrics need to recognise their strengths and weaknesses, and teachers need a firm understanding of the criteria, supports and training to use these rubrics for reviewing materials.

### *Science*

EdReports collaborated with NextGenScience to develop a guide that illustrates and provides unified definitions of design features in science materials to assist curriculum developers design science materials and educators to select or implement science materials. Teams from both organisations identified critical features from analyses of materials reviewed over past years, developed descriptions of the critical features, conducted a stakeholder review of the draft for the guide prior to its final revision.

NextGenScience and EdReports (2021) organises descriptions of 15 critical features into three sections. Learning Goals consist of three critical features: specifying the structure and content of the learning goals; describing the development of learning over time; and supporting students to reach all performance expectations in the grade or grade span. Student Supports consist of eight critical features organised into three groups. Phenomena and Problems consist of two critical features: driving learning with a phenomenon or problem; and matching the phenomenon or problem to the disciplinary core idea learning goals. Three Dimensions consist of two critical features: integrating learning of the three dimensions; and supporting students to use all three dimensions in an integrated way to sense-make or problem solve. Student-centred Instruction consists of four critical features: supporting students to feel as if they are driving learning; sequencing lessons and units coherently and linking them together logically from the students' perspectives; engaging students with relevant and meaningful phenomena, problems and activities; and supporting teachers to connect student assets and culture to instruction. Student Assessment consists of four critical features: requiring the use of multiple dimensions; supporting students with accessible and coherent assessments; including scoring guidance and supporting teachers to provide feedback related to student use of the three dimensions; and designing a coherent assessment system.

### ***Market research***

In July 2019, EdReports published the findings of a study to identify what percentage of English language arts and mathematics materials, marketed as standards-aligned, meet EdReports' criteria for alignment, what proportion of those materials used frequently meet expectations for alignment, and whether there is a relationship between the length of time that an EdReports' evaluation has been available for a material and its proportion of market share. Data on materials reviewed by EdReports between March 2015 and April 2018 were analysed to answer the first research question. Data reported for the American Instructional Resources Survey Project by Prado Tuma, Doan, Lawrence, Henry, Kaufman, Setodji, Grant and Young (2019) were analysed to answer the second research question. A multivariate, multilevel analytic framework was used to analyse data from American Instructional Resources Survey Project and EdReports' standards-alignment ratings of reviewed materials to answer the third research question.

EdReports (2019a) reported the results of the study and suggested extensions for further research. Of 472 materials reviewed by EdReports during this period, 49 percent of English language arts and 28 percent of mathematics materials met expectations for alignment with newer materials more likely to meet these expectations. However, only 15 percent of materials regularly used by English language arts teachers and 23 percent of materials regularly used by mathematics teachers met expectations for standards alignment. On the other hand, increasing age of a report's availability for a material that met expectations for standards alignment was associated with a one percent increase in teachers, who reported using aligned materials at least once a week. Furthermore, increasing age of a report's availability for a material that did not meet expectations for standards alignment was associated with a one percent decrease in teachers, who reported using aligned materials at least once a week. As well as extending statistical analysis into other aspects identified in the results of the study, the project lead concluded that research needs to be undertaken into materials available online and a database of information on the adoption and procurement of materials needs to be developed to facilitate further research into the effects of materials on student learning outcomes.

In May 2022, EdReports published the findings of a study to identify what proportion of English language arts and mathematics materials are aligned to college- and career-ready standards, how regularly these materials are used by teachers, how often teachers modify the materials they use, and the extent to which materials provide culturally relevant content and support diverse student needs. Data on materials reviewed by EdReports between March 2015 and January 2022 and in the 2019, 2020, and reported for the American Instructional Resources Survey Project by Prado Tuma, Doan, Lawrence, Henry, Kaufman, Setodji, Grant and Young (2020), Doan, Fernandez, Henry, Grant, Kaufman, Setodji, Snoke, Strawn and Young, (2021) and Doan, Eagan, Grant, Kaufman and Setodji (2022) were analysed to answer the first and second research questions. Data collected by surveying English language arts and mathematics teachers were analysed to answer the third and fourth research questions.

EdReports (2022a) reported the key findings of the study followed by three calls to action. Of 865 materials reviewed by EdReports during this period, 51 percent of English language arts and 44 percent of mathematics materials met expectations for alignment, while 32 percent of English language arts and 27 percent of mathematics materials partially met expectations for alignment. However, only 26 percent of materials used regularly by English language arts teachers and 40 percent of materials used regularly by mathematics teachers met expectations for alignment. Although 77 percent of teachers, using aligned materials, modified materials they used, 84 percent of teachers, using nonaligned materials, modified materials they used. Most teachers, with 82 percent and 73 percent respectively, believed that it is important for materials to be engaging for their students and aligned to state standards. Fewer teachers, with 42 percent and 37 percent respectively, believed that it is important for materials to include content and approaches that are culturally relevant and include supports for English learners. However, only 19 percent of teachers believed the materials provided by their districts or schools were completely adequate in terms of helping students master state standards, only 14 percent of teachers believed the materials provided by their districts or schools were engaging for students, only 10 percent of teachers believed the materials provided by their districts or schools met the needs of English learners, and only 9 percent of teachers believed the materials provided by their districts or schools helped provide culturally relevant instruction. Based on the discrepancies between what teachers believe materials should provide and what they deliver, there is a need to build principals' capacities to support teachers to use high-quality, aligned materials through relevant professional learning activities. Furthermore, evidence from surveying teachers showed that high school teachers were less likely to use standards-aligned

materials, make decisions about selecting materials, need support from principals in decision-making, and lack relevant professional learning activities. The report concludes with three calls to action for states and districts. First, they need to invest in high-quality, aligned materials. Second, they should provide professional learning that creates an environment for implementing and using high-quality, aligned materials. Third, they should involve teachers in selecting the materials they use in their classrooms.

### *Annual reports*

In May 2019, EdReports (2019b) published its first annual report. The report described the origins of EdReports, inaugural reviews of mathematics materials and expansion to analysing English language arts and science materials, compared the scope of the organisation's activities between March 2015 and the end of 2018, outlined the organisation's theory of action for identifying excellence in materials and increasing demands from states, districts and teachers for high-quality instructional materials, listed the Board of Directors, and presented a financial report.

In March 2020, EdReports (2020) published its second annual report. The report sets out information on impact data, reviewer data, a vision for 2020 and beyond, and additional information. Impact data report the number of instructional reviews published, documented districts using EdReports, largest districts documented using EdReports, school leaders who have heard of EdReports, district leaders who have heard of EdReports, collaborations with state departments of education, EdReports total page views, and publishers that have changed their materials in response to EdReports reviews. Reviewer data report the number of reviewers, reviewers' average years in education, reviewers' total years of experience in education, hours reviewers spent conducting reviews in 2019, and the state of the instructional materials market. The vision for 2020 and beyond outlines intentions to release initial reports in science for kindergarten to grade 5 and expanding partnerships with states and districts. Additional information presents financial statements, lists funders and specifies members of the Board of Directors.

In May 2022, EdReports (2022b) published its third annual report. The report sets out information on impact data, reviewer data, current projects, and organisational health. Impact data report the number of instructional reviews published, documented districts using EdReports, largest districts documented using EdReports, collaborations with state departments of education, a state spotlight on New Mexico and EdReports total page views. Reviewer data report the number of reviewers, reviewers' average years in education, reviewers' total years of experience in education, hours reviewers spent conducting reviews in 2021, a progress spotlight on the New Jersey High-Quality Instructional Materials Ambassador Program, a partnership with the National Center for Teacher Residencies to train teachers to use high-quality materials and the state of the instructional materials market. Current projects outline collaborations with NGSS to publish a resource describing cultural features of science materials and Education First to publish a primer defining key terms for culturally centred education, and projects to ensure materials celebrate and support multilingual learners, revise the review rubrics and for 2022 and beyond. Organisational health presents financial statements, lists funders and specifies members of the Board of Directors.

In June 2023, EdReports (2023) published its fourth annual report. The report sets out information on impact data, reviewer data, current projects, and organisational health. Impact



data report the number of instructional reviews published, a district spotlight on Metro Nashville Public Schools in Tennessee, documented districts using EdReports, largest districts documented using EdReports, collaborations with state departments of education, state spotlights on Ohio and Rhode Island, publishers that have changed their materials in response to EdReports' reviews and EdReports' total page views. Reviewer data report the number of reviewers, a reviewer's report, the Klawe Fellowship and the state of the instructional materials market. Current projects discuss a report on the state of the instructional materials market in 2021, a landscape analysis of materials for culturally responsive practices, a collaboration to build a foundation for multilingual learners in California for using high-quality materials, activities to support teachers to use high-quality materials, and activities for 2023 and beyond. Organisational health presents financial statements, lists funders and specifies members of the Board of Directors.

### ***Productivity and outreach***

By June 2023, EdReports had reviewed 97 percent of textbooks, digital materials and open educational resources available for English Language Arts and Mathematics. More than 1,400 districts enrolling over 15,800,000 students use EdReports' reports to select materials.

In October 2018, EdReports launched a revamped website, which is organised into five areas. Compare Materials presents the reports of reviews in English Language Arts for kindergarten to grade 2, grades 3 to 8, and high school, Mathematics for kindergarten to grade 8, and high school, and Science for grades 6 to 8 in a form that allows users to compare text quality, building knowledge, alignment rating and usability rating. Reports Center presents the reports of reviews as a database searchable by publisher, subject grade or report title, upcoming reviews, and rubrics and evidence guides. Resources present various resources relating to EdReports' activities. Impact presents information about productivity and outcomes for reviewers, annual reports and research reports. About Us presents biographies about EdReports' staff, Board of Directors and reviewers, the review process, recruitment of staff and reviewers, frequently asked questions, and contact details.

In 2015, Editorial Projects in Education, the publisher of the online newspaper, *Education Week*, launched EdWeek Market Brief to report research findings focusing on district purchasing of educational products and services, and the companies and products servicing them. In February 2019, EdWeek Market Brief published an article about the EdReports' review process based on an interview with EdReports' Executive Director, Eric Hirsch. In July 2019, EdWeek Market Brief hosted a webinar, in which Eric Hirsch outlined research findings about the positive effects of materials on student achievement, and EdReports' processes for reviewing materials, training reviewers and engaging with publishers. Sonja Santelises, Baltimore City Public Schools chief executive officer and EdReports' board member, outlined how this district uses EdReports' reviews.

Subsequently, EdReports (2019c) composed a case study describing an audit conducted by Baltimore City Public Schools to identify teachers' use of materials. The findings of the survey led to the introduction of a new process for adopting a new English language arts material involving a committee screening available materials followed by stakeholder engagement to select one of two materials. Poor participation of teachers in feedback sessions led the district to host a Facebook Live session for the local community. Following adoption of the new

material in June 2018, its implementation included professional development sessions for district staff, school leaders, teachers and literacy coaches.

EdReports hosts webinars to promote advocacy for the selection and use of high-quality instructional materials. In April 2021, EdReports held the first of a series of four webinars, *Adopting Materials through an Equity-focused Lens*. In the first webinar, presenters from EdReports, TNTP and UnboundEd discussed why materials matter, setting the stage based on the findings of a report published by TNTP (2018) and three principles set out in a paper by Wiggins, Parker, White and Schweld (2020). In the second webinar, presenters from EdReports, Aldine Independent School District in Texas and New Teacher Center discussed the role of instructional materials as a lever for equity, articulating a vision and how this works in practice. In the third webinar, presenters from EdReports, Partnership for Los Angeles Schools and Barrington Public Schools in Rhode Island discussed the role of instructional materials as a lever for equity, establishing adoption priorities and how this works in practice. In the fourth webinar, presenters from EdReports and Baltimore City Public Schools discussed the role of instructional materials as a lever for equity, stakeholder engagement during the adoption process and as a means for establishing equity. In February 2022, presenters from EdReports, St Clair County Regional Education Service Agency at Marysville in Michigan and the National Science Teachers Association discussed EdReports' review process with specific reference to high school science materials. In July and August of 2022, EdReports held a second series of four webinars, *State of the Instructional Materials: What Teachers want and what Students need*. In the first webinar, presenters from EdReports discussed the state of the instructional materials market and the key findings of the report published in 2022. In the second webinar, presenters from EdReports, the University of the People at Pasadena in California and Marple Newtown School District in Delaware County in Pennsylvania discussed the increase in availability of standards-aligned materials and the factors affecting their adoption. In the third webinar, presenters from EdReports, Grand Rapids Public Schools at Grand Rapids in Michigan and the Alliance College-Ready Public Schools at Los Angeles in California discussed factors influencing teachers' practice in modifying core materials to meet the needs of multilingual learners and provide culturally relevant content and approaches. In the fourth webinar, presenters from Washington Township Metropolitan School District at Indianapolis in Indiana, a private school at Canoga Park in California and Marple Newtown School District in Delaware County in Pennsylvania discussed the key factors of supportive leadership, ongoing coaching and professional development influencing implementation of high-quality instructional materials.

### ***Partnerships with states***

#### *California*

In mid-2015, EdReports began working with Orange County Department of Education, which provides support services to 27 districts in southern California. Mathematics coordinators, Jody Guarino and Vanessa Cerrahoglu offered to become partners in an effort to provide better guidance and support using EdReports' ratings by developing a series of training sessions and supports delivered to three districts. In September 2015, superintendents, coaches and teachers from three districts and one charter school met in Westminster to use EdReports' ratings to screen available materials and pilot selected materials in classrooms.

One of these districts, Newport-Mesa Unified School District, consisting of 32 schools located in Newport Beach, Costa Mesa and Corona del Mar, asked Orange County Department of Education for more intensive support to adopt a new mathematics material. Guarino, Cerrahoglu, Drake and Weisskirk (2018) reported that the adoption process, including professional learning, consisted of three phases: ground the work in shared understanding of the standards; apply the learning to two cycles of materials' evaluation; and build consensus. A steering committee was trained to screen available materials, publishers were involved in the final selection of two materials, 30 lead pilot teachers were trained, and 123 teachers piloted the materials. Since evidence collected during the pilot was inconclusive, a consensus process was used to reach agreement about adoption of one material. Embodied in the decision-making process, a teacher-centred approach assisted implementation of the adopted material. Afterwards, EdReports (2018) composed a case study outlining the adoption process.

Based on the success of the collaborative work with Orange County Department of Education, EdReports decided to customise its work to meet the needs of California's large materials' marketplace and the provision, introduced in 2013, allowing districts to use materials not adopted by the State Board of Education. Eric Hirsch met staff of Pivot Learning, a non-profit organisation based in the San Francisco Bay Area at a grantee conference held by the William and Flora Hewlett Foundation. This meeting led EdReports to form a partnership with Pivot Learning to provide independent reviews to help teachers identify high-quality instructional materials for use in California schools. The two organisations raised funds for the venture in 2016, and developed the components for a new website, California Curriculum Collaborative, launched at [www.calcurriculum.org](http://www.calcurriculum.org) in February 2017. Following the launch, the two organisations hosted a series of regional workshops to guide district teams to use the rubrics and processes on the website. Funded by the Bill and Melinda Gates Foundation, the two organisations added guidance to the website for science and English language learners.

The work of the California Curriculum Collaborative focuses on providing professional learning and resources to assist county offices of education and districts select, adopt and implement instructional materials. In 2018, workshops were held for districts with high proportions of students from low socio-economic and minority backgrounds. Early in 2019, workshops were held to discuss the 2018 state adoption of science materials and EdReports' reviews of science materials. In May and June of 2019, workshops were held at Sacramento and Santa Ana to help staff of county offices of education, district administrators and staff of charter management organisations to identify opportunities and strategies for implementing mathematics materials. In June 2020, a series of workshops were held in partnership with the California Department of Education to strengthen plans for implement mathematics materials. In June 2021, a virtual webinar was held in partnership with the California Department of Education for English language arts teachers to learn about the role of the California Department of Education and EdReports in relation to instructional materials, interpret reviews published by EdReports, and plan a solution to improve district English language arts programs. Beginning in August 2021, a year-long series of six workshops were held in conjunction with English Learners Success Forum to assist county offices of education and districts select, adopt implement instructional materials. In January 2023, a workshop was held in partnership with English Learners Success Forum for districts to learn about mathematics materials for multilingual learners, lead a selection process focused on the needs of stakeholders, develop communications, plans and build knowledge about high-quality instructional materials.

In March 2023, the California Curriculum Collaborative launched a new website organised into seven areas. Why Materials Matter outlines a rationale for adopting high-quality instructional materials, and presents research reports from the Center for American Progress, Brown Center on Education Policy at the Brookings Institution and TNTP that discuss the role of instructional materials in schools. Adoption sets out guidance on key areas to consider in the adoption process, and provides links to adoption resources for English language arts, mathematics and science. Implementation sets out conditions for successful implementation of instructional materials and provides links to implementation resources. Reports set out the EdReports' review process, annotations for foundational skills, kindergarten to grade 8 and high school materials for English Language Arts, Mathematics and Science containing EdReports' reviews and indicators of state adoption in California. Resources provide links to resources searchable by topic, content or media type. Blog shares guidance, resources, information and professional learning opportunities to support districts adopt and implement materials. About Us presents information about the partnership between EdReports and Pivot Learning, which merged with UnboundEd and CORE Learning in September 2022, as well as the findings of research studies about the effects of materials on student learning.

### *Florida*

In 2014, TNTP partnered with three districts in Florida to assess their implementation of the Florida Standards. Collection and analysis of data identified challenges to implementation arising from inconsistent professional development, and misaligned curricula and materials. In 2016, TNTP formed the Pilot Florida Implementation Network consisting of six districts: Brevard; Broward; Duval; Highlands; Pasco; and Pinellas. The six districts collaborated by establishing network goals, sharing work, and designing individual district work focusing on a few key areas. Focus on materials led the districts to request EdReports to support district reviews of mathematics materials under consideration for state adoption in 2018-2019 prior to revision of the adoption cycle following an executive order, issued by Governor Ron DeSantis in January 2019, requiring a standards' review that led to the adoption of Florida's Benchmarks for Excellent Student Thinking Standards in February 2020. EdReports released reviews of Florida editions for 15 mathematics materials between January and June of 2019.

### *Instructional Materials Professional Development Network*

In 2016, the Council of Chief State School Officer's (CCSSO) Chief Academic Officer Network met in Louisiana and examined the Louisiana Department of Education's initiative to assist districts ensure that teachers use high-quality materials. Network members visited schools, interviewed administrators and teachers, and learnt about Louisiana's policy to provide districts and schools with detailed information and tiered rankings of materials and professional development providers. The Chief Academic Officer Network decided to adapt this model for use in their own states and asked CCSSO to support them.

In February 2017, CCSSO created the Instructional Materials Professional Development Network to support Delaware, Massachusetts, Mississippi, Nebraska, New Mexico, Rhode Island, Tennessee and Wisconsin initiate state projects. In mid-2020, Arkansas, Kentucky, Louisiana, Ohio and Texas joined the Instructional Materials Professional Development Network, but Wisconsin left in January 2022. CCSSO periodically convenes meetings for teams from member states to provide opportunities for cross-state collaboration, discussions

with experts, feedback on state plans and challenges, and time to work on state plans. To facilitate this work, CCSSO developed the Instructional Materials Professional Development Network Policy Roadmap setting out strategies for states to develop policies to support their districts. The roadmap sets criteria for states to communicate and build allies for the initiative, incentivise the use of high-quality materials, increase the number of teachers participating in professional development grounded in using high-quality materials, increasing the number of teacher preparation programs for preservice teachers, and collect and analyse data for continuous improvement and verify targets.

EdReports collaborated with state education agencies in Massachusetts, Mississippi, Nebraska, New Mexico, Ohio, Rhode Island and Wisconsin to support their projects by providing technical assistance.

### *Massachusetts*

The Massachusetts Department of Elementary and Secondary Education collaborated with Teach Plus Massachusetts and the Rennie Center for Education Research and Policy to convene panels of Massachusetts educators to review materials for the Curriculum Ratings by Teachers (CURATE) project. Contracted to support the CURATE project, EdReports presented webinars on its review process and developed a strategy to involve publishers in the review process. Materials in English Language Arts for kindergarten to grade 5, Mathematics for grades 6 to 8, and Science and Technology-Engineering for grades 6 to 8 were reviewed in the 2018-2019 school year. Materials in English Language Arts for kindergarten to grade 8 and Mathematics for grades 9 to 12 were reviewed between September and December of 2019. Materials in English Language Arts for grades 3 to 8, Mathematics for kindergarten to grade 5 and grades 9 to 12, and Science and Technology-Engineering for grades 6 to 8 were reviewed between February and May of 2020. Materials in History and Social Science for kindergarten to grade 5, grade 8 and grades 9 to 12 were reviewed in 2023.

Certified teachers currently teaching in Massachusetts public or charter schools for a minimum of three years can apply to become a CURATE curriculum fellow through the Rennie Center for Education Research and Policy. Applicants, who submit a written application, are interviewed prior to selection. Following selection as a CURATE curriculum fellow, each educator is trained to use the rubrics and review process before reviewing document evidence independently. The review process is initiated by publishers submitting their products for an initial screen of each product to determine whether it is a comprehensive core material and has been found by an independent, teacher-based review process, such as EdReports, to be fully or partially aligned to the college- and career-readiness standards set out in the Massachusetts Curriculum Frameworks. Working in panels, the CURATE curriculum fellows evaluate, calibrate and rate the materials against specific criteria, and meet at panel sessions on four to six occasions. Each panel considers the findings from the independent review, information supplied by the publisher, and data collected by surveys from or interviews with Massachusetts educators in reaching a consensus on the ratings. Staffs from the Department of Elementary and Secondary Education and the Rennie Center for Education Research and Policy draft and refine a report on each material. The report is checked by the panel before being shared with the publisher. Each publisher is given an opportunity to respond to a report by correcting any inaccuracies and supply a written response. The panel may revise the report before it is published on the CURATE portal.

In September 2019, the Department of Elementary and Secondary Education launched a CURATE portal organised into six areas. Why CURATE presents a rationale for the CURATE project based on evidence from research findings, teacher reports and professional learning. Our Process provides advice to publishers and prospective reviewers about subject areas planned for review, and the review process. Reports present ratings for English language arts and literacy materials, mathematics materials, science and technology-engineering materials and digital literacy and computer science materials organised by an overview, standards alignment, classroom application and a publisher's report for each material. CURATE Fellowship outlines the process for applying or nominating a colleague for a CURATE curriculum fellowship. Frequently asked Questions list eight questions and responses. Resources provide links to quick reference guides, rubrics, and other sites and resources.

In 2019, the Department of Elementary and Secondary Education disseminated the CURATE program across Massachusetts. In February, grants were offered for districts to support adoption of high-quality materials by forming a curriculum council, providing a plan for decision-making and a preliminary plan for professional development or implementing high-quality materials by holding professional development sessions. Beginning in September 2019, a series of workshops was conducted for district teams to partner with EdReports and Department of Elementary and Secondary Education staffs to identify curricular needs for English language arts, mathematics or science, evaluate materials, engage in the selection process, and develop implementation plans. In December 2019, the Rennie Center for Education Research and Policy held an event, *High-Quality Curriculum: a Foundation for Student Success*. This event featured a keynote address by Commissioner Jeffrey Riley, an opportunity to learn how districts are identifying and using high-quality materials, and a panel discussion by Massachusetts educators.

The Department of Elementary and Secondary Education developed an online professional development course, *IMplement MA Process*, to assist districts select and implement high-quality instructional materials. *Implement MA Process* consists of four phases: learn and prepare; investigate and select; launch; and implement and monitor. Based on Instruction Partners (n.d.) and six adoption steps defined by EdReports, *Implement MA Process* presents a rationale for selecting high-quality instructional materials. Then the selection process is outlined according to five elements: instructional vision; communication; pausing for equity; professional development; and monitoring. Next, a district should select the appropriate phase at which it is entering the process. A menu allows a district to examine each phase commencing with an overview followed by an overview and action steps for each of several tasks. Learn and Prepare consists of four tasks: planning your process; curriculum council; local lens; and market landscape. Investigate and select consists of five tasks: narrowing your options; investigate – materials review; investigate – publisher meetings; investigate – pilot-field test; and making a final decision. Launch consists of five tasks: set goals, roles and monitoring plan; plan for assessment and grading investigate – materials review; expectations for use and collaborative planning; determine the plan for coaching; and teacher and administrator training. Implement and Monitor consists of three tasks: implement; monitor; and step back. The process concludes with things to keep in mind during the *IMplement MA Process*.

In 2022, the Department of Elementary and Secondary Education commenced the Evaluate and Select High Quality Instructional Materials Network by providing grants to facilitate districts to use the *IMplement MA Process*. District teams of two to four educators are supported by Department of Elementary and Secondary Education staff and resources to prepare an implementation plan and a launch for the *IMplement MA Process*.

## *Mississippi*

Late in 2017, the Mississippi Department of Education formed a High-Quality Instructional Materials working group, which designed an implementation plan consisting of a state-wide awareness campaign, revision of the textbook adoption process, and professional learning opportunities. The Department of Education worked with institutions of higher education teacher preparation programs to align expectations, launched a web page, and initiated a three-year pilot study with a small number of districts across the state.

In March 2018, the Department of Education convened a summit at Jackson, Mississippi, for district superintendents, curriculum coordinators, and higher education faculty focusing on the High-Quality Instructional Materials and Professional Learning initiative. Keynote speakers, David Steiner from Johns Hopkins University and Rebecca Kockler from the Louisiana Department of Education, discussed research findings and provided expert advice on why the initiative should increase teacher capacity, improve student outcomes, and expand equitable access in Mississippi schools.

The Department of Education selected 18 districts to serve as pilot sites to strengthen the materials' review and selection process. As an initial step in the pilot study, the Department of Education worked with Student Achievement Partners to conduct a three-day institute on the mathematics shifts and standards for curriculum coordinators, administrators, and lead teachers from eight districts. Selected teachers in the pilot districts received intensive training on the Mississippi Career- and College-Readiness Standards, reviewed mathematics materials, and participated in developing a comprehensive list of mathematics materials. Teachers also participated in periodic meetings and on-site observations with Department of Education staff regarding district-wide implementation of mathematics materials.

The Department of Education worked with EdReports over several months to develop Mississippi-specific mathematics rubrics for kindergarten to grade 8 and high school, train mathematics reviewers, and support the pilot districts. The mathematics rubrics consist of criteria and indicators for analysing materials through three gateways: focus and coherence; rigour and mathematical practices; and instructional support, usability and assessment. The rubrics are complemented by evidence guides that support the identification of evidence and scoring criteria.

Early in 2020, the Department of Education formed a committee to work with EdReports on developing Mississippi-specific English language arts rubrics for kindergarten to grade 2, grades 3 to 5, grades 6 to 8 and grades 9 to 12. Over the course of several months, subject experts from EdReports worked with stakeholders from institutions of higher education, district curriculum coordinators, literacy coaches and teachers to develop the rubrics. Stakeholders participated in working group sessions to discuss the design of the rubrics and provided feedback on rubric drafts to ensure alignment to the state standards. The English language arts rubrics consist of criteria and indicators for analysing materials through three gateways: text quality and complexity and alignment to the standards with tasks and questions grounded in evidence; building knowledge with texts, vocabulary and tasks; and usability. The rubrics are complemented by evidence guides that support the identification of evidence and scoring criteria.

Following publication of the rubrics, the Department of Education released requests for proposals, asking publishers to submit materials for review. At the same time, the Department of Education invited applications from educators to serve as reviewers for state adoption of mathematics materials in 2019 and English language arts materials in 2020. Applicants completed performance tasks to determine their content knowledge and skills, and successful applicants were interviewed. Grade level review teams were formed, and reviewers were approved by the governor and state superintendent. Following training by EdReports, the reviewers screened and analysed the submitted materials. Once the reviews were completed, a writer produced final reports on each material to provide district and school personnel with overviews on whether each material met or partially met the requirements of the rubric. Following approval by the state board of education, adoption lists were posted on a new website, Mississippi Instructional Materials Matter.

Districts are expected to review their current materials or materials they intend to adopt by forming review teams consisting of five reviewers, a facilitator and a writer. After reviewers are trained in using the rubrics and how to collect evidence to inform their ratings, they spend time becoming familiar with the materials under consideration, reviewing indicators, collecting evidence and synthesising team findings. The facilitator synthesises the findings of the team and passes the findings onto the writer, who develops draft reports for consideration by the review team. The review team considers revisions to the report and finalises a rating for each material as meets or partially meets expectations of the requirements of the rubric.

In September 2020, the Department of Education launched Mississippi Instructional Materials Matter at [msinstructionalmaterials.org](https://msinstructionalmaterials.org) to assist Mississippi teachers access information about high-quality materials. Mississippi Instructional Materials Matter is organised into four areas. State-adopted Materials outlines the state adoption process for English language arts, mathematics, science and social studies, presents the rubrics, and lists state-adopted materials for each subject area. Selecting Materials poses questions about the state adoption schedule, the state rating committee timeline, the publisher caravan timeline, and lists the rubrics for English language arts, mathematics, science and social studies. Districts present information for public and non-public schools. Resources present key messages for high-quality instructional materials, the Textbook Inventory Management System, definitions referring to high-quality instructional materials, professional learning resources, and the Mississippi Career- and College-Readiness Standards for English language arts, mathematics, science and social studies.

### *Nebraska*

In 2017, the Nebraska Department of Education, in partnership with the state's 17 educational service units, began a process to identify the most commonly used materials in Nebraska schools. With support from EdReports, the Department of Education designed a state-specific website that includes resources to ensure that materials meet the expectations of Nebraska's College- and Career-Ready Standards. Following the launch of the website, EdReports partnered with the Department of Education and the educational service units to train the staffs of the educational service units to support districts use the website. In October 2019, the Nebraska Instructional Materials Collaborative commenced the Nebraska Instructional Materials and Professional Learning Innovation Network Fellowship to support cohorts of educational service units and districts select and implement new materials. Phase One placed



a focus on learning collaboratively and developing plans to review materials for English language arts, mathematics and science.

In August 2018, the Department of Education launched Nebraska Instructional Materials Collaborative at [nematerialsmatter.org](http://nematerialsmatter.org) to provide state-wide leadership that informs and supports decisions made locally related to curriculum and instructional materials. Nebraska Instructional Materials Collaborative is organised into six areas. ELA presents EdReports' reviews searchable by grade, steps in the phases for instructional materials selection, planning for implementation, and professional learning and progress monitoring, and links to external resources. Math presents EdReports' reviews searchable by grade, steps in the phases for instructional materials selection, planning for implementation, and professional learning and progress monitoring, and links to external resources. Science presents EdReports' reviews searchable by grade, steps in the phases for instructional materials selection, planning for implementation, and professional learning and progress monitoring, and links to external resources. Social Studies present links to reviews of materials posted on Mississippi Instructional Materials Matter, and links to external resources. Nebraska Resources present definitions to key terms, provide links to events, present archived webinars, set out eight steps for selecting materials and links to resources, and present a toolkit consisting of communications, professional learning and research resources, list frequently asked questions, present an instructional materials map, and provide a series of videos about the Instructional Materials and Professional Learning Innovation Network Fellowship. About presents a rationale statement for the Nebraska Instructional Materials Collaborative and contact details.

The presentation of webinars is a key focus of the Nebraska Instructional Materials Collaborative. In September 2018, the Nebraska Instructional Materials Collaborative hosted a webinar to introduce Nebraska educators to issues relating to high-quality aligned materials, EdReports' review process, and features of the website. In March 2019, the Nebraska Instructional Materials Collaborative began hosting a series of webinars involving publishers' representatives discussing the components of materials for English language arts, mathematics and science. In March 2019, the Nebraska Instructional Materials Collaborative hosted a webinar presented by Student Achievement Partners focusing on the selection of high-quality materials. In September 2020, the Nebraska Instructional Materials Collaborative hosted a webinar presented by Student Achievement Partners focusing on the importance of high-quality instructional materials, factors affecting their implementation and availability. In November 2020, the Nebraska Instructional Materials Collaborative hosted a webinar presented by TNTP on the science of reading consisting of four parts: phonological awareness and phonics; knowledge and vocabulary; comprehension and fluency; and analysis and responding to data in foundational literacy. In 2021, the Nebraska Instructional Materials Collaborative hosted a panel discussion on the importance of professional learning to implement high-quality instructional materials for reading effectively. In 2022, the Nebraska Instructional Materials Collaborative hosted two webinars presented by EdReports on the importance of a comprehensive, transparent selection process for high-quality science materials, examine the characteristics of science materials, and inform about resources available from the Department of Education and EdReports to support kindergarten to grade 8 and grades 9 to 12.

*Rhode Island*

In 2016, the Rhode Island General Assembly passed *An Act Relating to Education - The Rhode Island Board of Education Act*, requiring a comprehensive study of a unified approach to state-wide education. In the report on the study, the Rhode Island Department of Education (2017) found from a state-wide survey of educators that they did not have a shared definition of curriculum, spent excessive time searching for materials, and believed materials they used could be improved. The report recommended developing a consistent curriculum for English language arts and mathematics, and enabling districts to identify high-quality materials and plan for implementation. The report's recommendations led the Department of Education to establish a state-wide curriculum and professional learning initiative consisting of four strategies.

In 2017, the Division of Teaching and Learning began a series of district network meetings on curriculum. In October 2017, David Steiner discussed research findings indicating that high-quality instructional materials affect student learning. In January 2018, Eric Hirsch, [REDACTED] presented an overview on the work of EdReports. In May 2018, [REDACTED] discussed the role of high-quality English language arts materials for developing independent and proficient readers. In June 2018, [REDACTED] discussed the importance of standards-based education in increasing equity for disadvantaged ethnic groups. In October 2018, [REDACTED] discussed common pitfalls for implementing materials and presented a framework for effective implementation.

After working with Rhode Island districts in 2016, the Department of Education contracted EdReports to assist districts access and use information about the quality of mathematics and science materials during the adoption process. Beginning in May 2018, four cohorts of district teams consisting of five to seven educators, who perform different roles, each participated in a series of six workshops over the course of six months. Sessions covered content ranging from setting instructional visions and district priorities at the beginning to implementing materials at the end. The model applied in the sessions led to four benefits: a formal, structured approach; the ability to learn from other districts; deep learning within district teams for various educator roles; and content focusing on the selection and adoption process. Later, EdReports (2021) produced a case study discussing transformation of the state's curriculum to focus on the selection and adoption of instructional materials.

At the same time, the Department of Education conducted two state-wide surveys to identify what materials districts were using for reading and mathematics for kindergarten to grade 8. In 2017-2018, *Eureka Mathematics* and *EngageNY* were the most commonly used materials in mathematics although ten districts used locally developed materials, while the majority of districts used locally developed materials for reading. Of 52 districts that responded to the survey in 2018-2019, 23 districts were using mathematics materials and seven districts were using reading materials rated as high-quality by EdReports. Another seven districts were expected to adopt high-quality mathematics materials and another eight districts were expected to adopt high-quality reading materials in 2019-2020.

In 2019, the Rhode Island General Assembly passed the *Rhode Island General Law 16.22.30-33* requiring the commissioner of elementary and secondary education to develop state-wide curriculum frameworks for English language arts-literacy, mathematics and science, identify at least five examples of high-quality instructional materials for each subject area, and support districts in the selection and implementation of instructional materials. Developed by interdisciplinary teams through a consultative process incorporating feedback from racially and

ethnically diverse groups of stakeholders, the curriculum frameworks were released in October 2021.

All districts are required to adopt high-quality instructional materials aligned to the curriculum frameworks and state standardised tests by June 2023 for English language arts-literacy and mathematics and June 2025 for science. In June 2020, the Department of Education published an approved list of high-quality instructional materials for English language arts-literacy and mathematics based on reviews by EdReports. Intended to assist districts select high-quality materials, the list was revised in January 2021 and then updated annually. Each district should appoint a representative committee to develop an instructional vision based on examination of student data, screen available materials and then select materials following in-depth examination, use the Department of Education's instruments to understand culturally-responsive and sustaining education, the needs of multilingual learners and foundational skills for reading, and plan implementation of adopted materials by preparing teachers through professional development.

### *Wisconsin*

In mid-2018, the Wisconsin Department of Public Instruction commissioned the Center for Public Research at Columbia University to conduct a series of focus groups with teachers and instructional coaches to learn their perceptions about defining, selecting and accessing high-quality materials and associated professional learning, issues that resonate or concern them in these areas, and steps that should be taken to support them. The methodology involved interviewing eight key state officials, conducting focus group sessions with 79 educators at five cooperative educational service agencies, and using codes for qualitative analysis of focus group data.

Cahn, Blancato and Yoon (2018) reported the findings in relation to seven categories: content of materials; selection of materials; content of professional learning; selection of professional learning; equity; messaging; and communications. For the first category, subjects wanted materials that align to the Wisconsin Academic Standards, were sceptical of the quality of commercial materials and had greater faith in self-developed materials, sought to balance availability of materials with time to identify them, wanted materials that are useful for differentiation, and varied in their opinions about materials that are directive. For the second category, variability prevailed in how materials were selected and the extent to which teachers were involved in the decision-making process, the process was based on screening available materials to produce a short list, and decision-making was affected by factors that are not related to the quality of materials. For the third category, subjects preferred direct professional learning delivered by providers with real and recent teaching experience, and ongoing professional learning that allowed for implementation of the learning. For the fourth category, variability prevailed in how districts select professional learning providers, but teachers had greater input into selection decisions, and they wanted professional learning that was differentiated based on their needs. For the fifth category, subjects with greater familiarity with issues of equity were more vocal about its importance, and awareness of equity issues was highest among subjects, who received support from the Department of Public Instruction. For the sixth category, subjects found certain concepts motivating, and several key concepts resonated as characteristics of high-quality materials. For the seventh category, subjects cited being most influenced by other teachers they knew, and reported having contacts with the

Department of Public Instruction mainly in relation to licensure, accountability and data analysis.

In November 2018, the Department of Public Instruction hosted a one-day professional learning event, *Quality Instructional Materials: Unlocking Teacher Creativity and Increasing Equity*, for over 400 educators, consisting of school-based teams convened at the state's 12 cooperative educational service agencies. ██████████ outlined the theme for the event. ██████████ discussed the importance of standards-based education in increasing equity for disadvantaged ethnic groups. Eric Hirsch discussed the importance of materials, examined research findings about the impact of using materials, and considered recommendations for a strong adoption and implementation process. In a concluding session, three educators described local adoption and implementation processes used in Wisconsin.

In response to the needs of stakeholders that do not generally use the cooperative educational service agencies for technical assistance, the Department of Public Instruction sponsored a five-part professional learning series in 2019 focusing on implementation of high-quality materials. This series included a two-day workshop facilitated by EdReports focusing on selection and adoption of materials, and four additional workshops facilitated by Instruction Partners focusing on their online guide. The online guide, published by Instruction Partners (n.d.), consists of background information, two vignettes, a workbook, and a collection of resources, which can be used by teams of teachers for selecting and implementing materials through three phases: selecting great materials; preparing to launch materials; and teaching with the materials and learning how to use them.

Late in 2018, Cooperative Educational Service Agency 4, serving 26 mostly rural districts in western Wisconsin, received a grant from the Department of Public Instruction for four districts to design a better decision-making process for selecting materials. The agency's staff facilitated meetings for teams from the four districts to consider EdReports' reviews of mathematics and English language arts materials, as well as case studies on how districts and states conduct the materials' adoption process. The teams used EdReports' reviews to screen available materials and compile a list of three materials for mathematics and two materials for English language arts. Another 12 districts were invited to participate in the project in order to encourage publishers' representatives to give presentations focusing on EdReports' reviews of their products and the needs of district adoption committees for information. Later, EdReports (2019d) composed a case study outlining the adoption process.

Late in 2019, the Department of Public Instruction surveyed the state's 421 districts to identify materials they use in English language arts and mathematics, their selection processes, and types and frequencies of professional learning. Of 326 districts that responded to the survey, approximately 50 percent have a formal selection and adoption process. In 2021, the Department of Public Instruction contracted the Wisconsin Center for Educational Research to conduct a second annual survey of districts. In April 2021, the Department of Public Instruction published a state-wide map reporting data about English language arts and mathematics materials used by approximately 80 percent of the state's districts. Updated annually, the map enables districts to identify materials used, negotiate purchasing discounts with neighbouring districts or contract professional learning from a vendor in a consortium using the same materials.

In 2020, the Department of Public Instruction collaborated with Rivet Education to design an online Wisconsin Professional Learning Partner Guide to assist Wisconsin districts and schools

identify education organisations and publishing companies, which provide curriculum-aligned professional learning. Rivet Education invited education organisations and publishing companies to apply for review by a trained team of educators with expertise in high-quality materials and aligned professional learning. Applicants submit professional learning documents for review against criteria to assess if the organisation or company provides evidence of professional learning services. Rivet Education conduct two review cycles each year, and approved providers are listed in the Wisconsin Professional Learning Partner Guide for two years. Launched in July 2021, the Wisconsin Professional Learning Partner Guide provides an online searchable database of professional learning providers and Wisconsin resources at [wisconsin.plpartnerguide.org](http://wisconsin.plpartnerguide.org).

### ***Partnership with Learning Forward***

A professional association based at Oxford, Ohio, Learning Forward builds the capacity of leaders to establish and sustain effective professional learning. At its summer institutes held at Portland, Oregon, in July 2018, Learning Forward collaborated with EdReports, the Carnegie Corporation of New York, BSCS Science Learning, CenterPoint Education Solutions, the Institute for the Study of Knowledge Management in Education and UnboundEd to strengthen professional learning for implementing instructional materials.

Prior to the institutes, Learning Forward (2018) published a paper exploring the premise that good teachers can motivate and engage students by using high-quality materials. This contention was supported by three case studies of exemplary practice: implementation of EL Education's *K-5 Language Arts Curriculum* at Hollis Innovation Academy in Atlanta; implementation of *Connected Mathematics Program*, published by Pearson, by Colonial School District in Delaware; and piloting of *Core Knowledge Language Arts* published by Core Knowledge Foundation, *Wit & Wisdom* published by Great Minds and the *Read Aloud Project* published by Student Achievement Partners by 13 districts in Tennessee. Five lessons were learnt from evidence obtained in the case studies. First, selecting high-quality, aligned materials are of key importance. Second, using a standards-aligned material well requires skilful professional learning. Third, investing in leadership at the school and district levels is essential. Fourth, ensuring expert teacher leaders is important. Fifth, effective team learning is part of a larger instructional improvement and learning system. Connecting professional learning to high-quality materials, however, poses three challenges: aligning assessments, observations and curriculum; establishing sufficient regularly scheduled time and structure for professional learning communities and other teaching strategies; and applying change management strategies. Five actions were recommended to integrate professional learning and high-quality materials. First, build deeper knowledge about this issue. Second, assess the quality of the curriculum. Third, establish professional learning communities. Fourth, strengthen learning teams. Fifth, develop building- and team-level expertise.

In May 2018, Learning Forward held a webinar, *Building the Case for Connecting High-Quality Curricula and Team-Based Professional Development*. Presenters, [REDACTED] [REDACTED] from Learning Forward, Eric Hirsch and [REDACTED] from EdReports, and J [REDACTED] from Orange County Department of Education discussed research findings confirming the importance of aligned curriculum and materials, and using professional learning communities to ensure effective implementation.

The four-day institutes were conducted by 21 facilitators from the six organisations as well as Ed Trust and Cherry Creek School District in Colorado. The program consisted of an introductory session attended by 227 participants on the first day, the choice of one of five sessions on the second and third days conducted by a partner, and a concluding session for all participants on the last day. The introductory session focused on advancing equity and excellence through professional learning tied to curriculum implementation. EdReports focused on high-quality materials and aligned professional development. BSCS Science Learning focused on building capacity to implement the NGSS. UnboundEd focused on understanding the standards and shifts in secondary mathematics. The Institute for the Study of Knowledge Management in Education focused on adopting open educational practice to improve literacy-based curriculum at the secondary level. CenterPoint Education Solutions focused on strengthening assessment literacy. In the concluding session, Learning Forward focused on how team learning cycles and high-quality materials strengthen learning.

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