

# CURRICULUM SUPPORT — GUIDE —

W O R K B O O K

Key Action I.1: Plan Your Process

# I.1: PLAN YOUR PROCESS

## Phase I: Select

### > Key Action I.1: Plan Your Process

Key Action I.2: Establish the Vision  
Key Action I.3: Develop the Rubric and Prepare for Reviews  
Key Action I.4: Review, Pilot, and Decide  
Key Action I.5: Procure and Distribute Materials

Step I.1.A: Identify the Selection Team and Leader

Step I.1.B: Determine how the Final Decision will be Made

Step I.1.C: Map the Schedule of Events

Step I.1.D: Form the Review Committee

Step I.1.E: Organize Next Steps and Communicate the Plan

## WHAT IS THE GOAL?

The goal of this key action is to plan your selection process.

## WHY IS THIS KEY ACTION IMPORTANT?

This key action begins once you decide that you need to select new materials. The way you approach selecting the materials sets the stage for how stakeholders will think and feel about the materials and implementation journey. If your process has a clear and compelling vision, especially one that includes engaging teachers and incorporating perspectives of all members of the community, odds are you'll build a team of champions who will stick through the process even when the going gets tough. Among early implementers, those who were clear about the plan from the start built clarity and confidence, and those who skipped this key action often experienced confusion, suspicion, and downstream investment challenges.

## EXPLANATION OF LANGUAGE

We use the term **Selection Team** to refer to the central system team responsible for guiding this process across a system (full district or network of schools). In school systems that delegate materials selection to the school, the Selection Team would be a school level team. This team, facilitated by a **Selection Team Leader**, designs and manages the process. The **Review Committee** is a broader group that engages in the review of materials.

# I.1.A: IDENTIFY THE SELECTION TEAM AND LEADER

## GUIDING QUESTIONS

i. What subject and/or grade span are you seeking new materials for?

ii. How will the Selection Team be named?

iii. What perspectives are needed on our Selection Team?

iv. Who will serve on the Selection Team?

v. Who will lead the Selection Team?

vi. When and how will we launch the work with the Selection Team?

## NOTES

Typically, the school system leader (Director of Schools) or Chief Academic Officer names the Selection Team Leader. The resource [Selection Team Process and Team Member Criteria](#) lays out the different ways the Selection Team, Selection Team Leader, and Review Committee can be chosen. At this point in the process, focus on the Selection Team Leader and Selection Team. You will learn more about the Review Committee in **Step I.1.D: Form the Review Committee.**

Because this team's job is to plan and manage the process, keep the team as small and nimble as possible while ensuring key perspectives are represented. See [Selection Team Process and Team Member Criteria](#) for considerations in building the team.

The Selection Team will come together to design the process in **Step I.1.C: Map the schedule of events.** That process will dictate the specifics, but Selection Team members should have the time to dedicate several full days of training, planning, and regular meetings across the selection process. Check out the [Selection Timelines.](#)

The Selection Team Leader is typically the instructional leader for the system or the leader for that content area. [Selection Leader Competencies](#) lists the key skills and competencies needed.

You can adapt the [Sample Email for Launching the Work of the Selection Team](#) resource and send it to Selection Team members to launch the work. This does not include broader communication to all stakeholder groups – that will come in **Step I.1.E: Organize next steps and communicate the plan.**

See **Step I.1.B: Determine how the final decision will be made** for a sample agenda and prep email for the launch meeting.



## I.1.C: MAP THE SCHEDULE OF EVENTS

### GUIDING QUESTIONS

i. What is our ideal selection date?

ii. What key events do we want to include in our selection process?

iii. What is the timeline of events for our process?

iv. Who is responsible for each event?

v. What Selection Team routines do we need to support this process?

### NOTES

In this step, your Selection Team backward maps the selection process. Download the [Selection Plan](#) template, which you can use to organize your decisions and next steps. This template can serve as an organizing document during Phase I.

Go to the [Description of Selection Events](#) for a list of common events in the selection process that can be used as a starting point. Begin setting up times for events in the [Selection Plan](#).

Our sample [Selection Timelines](#) can serve as a starting point for you to use.

Most systems found it helpful to order materials three months in advance of when they're needed. Make sure to factor this into your timeline.

Some regular meetings and/or email updates serve to keep Selection Teams on the same page.

## I.1.D: FORM THE REVIEW COMMITTEE

### GUIDING QUESTIONS

i. Given how the selection decision will be made, what is the Review Committee's job?

ii. What is the time commitment?

iii. What compensation or recognition can we offer?

---

iv. What perspectives do we need?

v. How many committee members will we need?

---

vi. How will we recruit and advertise the opportunity?

vii. What process will we use for nominations and applications?

viii. How will we select Review Committee members?

### NOTES

The Review Committee plays a particularly critical role in the selection of materials.

Look back at your notes from the [Selection Team Process and Team Member Criteria](#) to revisit the role of the Review Committee and the [Selection Plan](#) for your key events timeline to identify the time commitment and any key dates for the Review Committee.

The [Review Committee Job Description](#) is a sample job description for the Review Committee members that you can use as a starting point.

[Selection Team Process and Team Member Criteria](#) has key considerations for the composition of your Review Committee.

[Selection Team Process and Team Member Criteria](#) highlights approaches that early implementers used to select Review Committee members.

The resource [Equitable Committee Recruitment Guidance](#) includes a set of key questions to think through in order to ensure a fair recruitment process.

# I.1.E: ORGANIZE NEXT STEPS AND COMMUNICATE THE PLAN

## GUIDING QUESTIONS

- i. What groups in our community have an interest in the outcome of this process?
  
- ii. What will each stakeholder group want to know?
  
- iii. What communication channels already exist that we can use to communicate with each group?

---

- iv. What are the key messages that we want to reinforce in all communications about our materials selection and implementation?

---

- v. What will each stakeholder group want to know about this selection process?
  
- vi. What will each stakeholder group want to know about why we designed this particular process?
  
- vii. How do we plan to proactively communicate this information? Who will deliver the communication? When?
  
- viii. What questions do we expect we will get? How will we answer them?

## NOTES

Proactively thinking through your stakeholders' needs and questions and designing your communications to address their needs builds confidence that you have everyone's interests at heart.

Use the [Selection Plan](#) template, which allows you to identify key stakeholder groups, and see the [Stakeholders for Selection](#) resource for a list of the common groups and subgroups.

You will keep coming back to this stakeholder list throughout the process.

Go back to your [Selection Plan](#) to make sure you have included communication to stakeholder groups. [Key Messages on the Selection Process](#) includes some of the commonly cited key messages.

Go back to your [Selection Plan](#) to review the decisions you made as a Selection Team.

For each stakeholder group, identify the key information that you want to communicate. Use the [Selection Plan](#) template to map out your communications.

Download the [Email for Communicating About the Selection Process](#) and the [PowerPoint for Communicating About the Selection Process](#) resources to use as a starting point to communicate your process.

Role playing (which can be awkward but equally useful) can help make sure Selection Team members are on the same page as questions come up.

## Selection Team Process and Team Member Criteria

*This resource shares the purpose and composition of the Selection Team and Review Committee. It outlines processes, competencies, and application considerations for assembling the teams.*

Selection Team Leader			
Manages the overall review and selection of materials, including management and coordination of the Selection Team and Review Committee			
Selection Team		Review Committee	
<p><i>Purpose:</i> Responsible for designing and managing the selection process, including review of materials</p>	<p><i>Who:</i> Small group (up to 12) representing wide variety of stakeholders</p>	<p><i>Purpose:</i> Conducts a review of the materials and provides input/recommendation to the Selection Team</p>	<p><i>Who:</i> Broad group of stakeholders and users, including members of the Selection Team</p>

The size of each of these groups will likely vary by the size of the district and number of grades that will use the new materials. For the Selection Team, it should be relatively small in order to facilitate planning, coordination, and decision-making. The Review Committee may be much larger and is a great opportunity to involve many stakeholders and users of the materials.

### Composition of the Selection Team and Review Committee

Both the Selection Team and Review Committee should have a variety of representatives from different stakeholder groups.

- Teacher engagement and membership is a must-have. Both research and interviews with early implementers showed that having teachers involved as early as possible helps create broad buy-in for teachers across the district. Teachers bring a pragmatic, on-the-ground perspective when looking at materials, and their early input can prevent the selection of materials that look great on paper, but don't work in classrooms.
- Both teams should include teachers, instructional coaches, assistant principals, principals, district leaders, and representation from any other instructional roles that are common in the district. Educators that work closely with diverse student needs will bring critical perspectives to the process.

- The Review Committee should have at least one teacher and leader from each school in the system that will use the new curriculum. Teachers will want to know how the review process is going and having someone at their school they can talk to about it will help them feel connected to the process.
- Ideally, there is a teacher from each of the grade levels that will use the materials. This is especially important if you're adopting for a wide range of grade levels, like K-6. What works in 3rd grade may not work in Kindergarten, for example, and having teacher-level perspective can make sure you choose materials that work for everyone.

**Sample Criteria and Questions for an Application or Nomination Form**

Districts should choose application questions that align with the candidate criteria they listed in their Curriculum Selection Plan. The table below provides sample questions by category that can be used to create an application or nomination form.

Criteria	Sample Fields/Questions
<p><b>Personal Information</b></p>	<ul style="list-style-type: none"> <li>▪ Name</li> <li>▪ Which school do you work?</li> <li>▪ What position do you currently hold? (teacher, principal, coach)</li> <li>▪ Years of experience</li> </ul>
<p><b>Excited about the potential of a new curriculum to support teachers and students</b></p>	<ul style="list-style-type: none"> <li>▪ Why do you want to serve on the Selection Team/ Review Committee?</li> </ul>
<p><b>Possesses deep knowledge of standards</b></p>	<ul style="list-style-type: none"> <li>▪ Choose an academic standard for your grade level that represents the major work of the grade. Then, create an assessment for that standard. Copy the assessment into this form.</li> <li>▪ Choose an academic standard for your grade level. Then, describe a lesson that would teach that standard.</li> </ul>
<p><b>Demonstrates effectiveness as a teacher or leader</b></p>	<ul style="list-style-type: none"> <li>▪ What does rigorous instruction look like in your grade level?</li> <li>▪ Describe a lesson that embodies that vision.</li> </ul>

<p><b>Communicates well with others</b></p>	<ul style="list-style-type: none"> <li>▪ Tell us about a time when you had to work with a team of educators on a task. How did you communicate with one another?</li> <li>▪ <i>The overall writing in the application can serve as evidence of the candidate's communication ability.</i></li> </ul>
<p><b>Collaborates well with others</b></p>	<ul style="list-style-type: none"> <li>▪ Tell us about a time when you had to collaborate with others. What was the task? How did you work together with your team?</li> </ul>
<p><b>Able to synthesize large amounts of information</b></p>	<ul style="list-style-type: none"> <li>▪ Tell us about a time when you had to process a lot of information at once. What did you do?</li> </ul>
<p><b>Makes decisions strategically</b></p>	<ul style="list-style-type: none"> <li>▪ Tell us about a time when you had to make a difficult decision. What variables did you consider? How did you know you were making the right decision?</li> </ul>
<p><b>Organized; meets deadlines</b></p>	<ul style="list-style-type: none"> <li>▪ How do you stay organized?</li> <li>▪ Tell us about a time when you had to meet a deadline. What did you do to ensure you completed the task on time?</li> </ul>

### Creating the Selection Team and the Review Committee

There are multiple options for how to create the Selection Team and the Review Committee. There are different processes, each with their own benefits and trade-offs, to consider.

Processes	Benefits	Trade-offs
<p><b>Open application process</b></p>	<p>An open application process is the most democratic way of selecting a committee as anyone can choose to apply. Because potential members choose to apply, they are likely to be enthusiastic about the opportunity. Commitment to the process will likely be high. An open application process</p>	<p>Application materials need to be created, distributed, and reviewed. Clear and consistent methods for evaluating applicants are needed. This method requires time and organization.</p>

	encourages teachers to be proactive in their own development as teacher leaders.	
<b>Nomination process</b>	A nomination process is an efficient way to get diverse recommendations. A nomination process can encourage educators to recognize the great work of their colleagues and help ensure some aspects of diversity of perspective (i.e. school) are accounted for on the front end.	Educators who are interested in serving on the committee are dependent on someone nominating them. Educators who are less well-known or newer in their school(s) or district may be less likely to get nominated. Special attention needs to be paid to ensure a diversity of perspectives are represented by those nominated and how nominations will be reviewed and approved/selected.
<b>Appointed membership</b>	Appointment to the committee by district leaders is the most efficient method of selecting a committee. It helps ensure diversity from the beginning (as long as diversity goals have been clearly articulated). Minimal process or paperwork is needed.	Educators can feel left out of the process. Educators who are less well-known in their schools or district may be less likely to be appointed. There may be less investment in the process by those appointed to the team than if they had opted in themselves.

*Questions to Consider:*

- How much time do we have to invest in the process for naming the Selection Team and Review Committee?
- How will we ensure diversity of perspective through the selection process?
- How will we communicate about the opportunity for the Selection Team and Review Committee based on our selection process?
- Which process is best for us and how will we plan to minimize the trade-offs?

## Equitable Committee Recruitment Guidance

*This resource includes a set of key questions and considerations to think through in order to ensure a fair recruitment process.*

Questions to Ask	Areas to Consider
<p>What are key priority stakeholder groups to have involved in the selection of materials for our school/district?</p>	<p>Potential starting list - teachers, parents, students, and/or community members who are, or are parents/guardians of:</p> <ul style="list-style-type: none"> <li>• Students with disabilities</li> <li>• English learners</li> <li>• Specific cultural/ethnic groups</li> <li>• Students from low-income backgrounds</li> <li>• Advanced students</li> <li>• Students behind grade level</li> <li>• Other:</li> </ul>
<p>In the committee recruitment process, how are we recruiting stakeholders from these groups to engage in the committee process?</p>	<ul style="list-style-type: none"> <li>• Create recruitment and informational materials in English as well as other prevalent languages in your community</li> <li>• Create objective criteria to evaluate applications for the committee (if applicable)</li> <li>• Identify and empower opinion leaders who are members of prioritized groups to invite individuals from their networks to apply</li> <li>• Implement multiple, varied communications efforts to attract the interest of a diverse group of committee members</li> </ul>
<p>Do we have representatives from each of these groups on the committee? Does the committee as a whole reflect our students?</p>	<ul style="list-style-type: none"> <li>• Gather and analyze data related to key priority stakeholder groups as part of creating the committee, whether using a nomination or application process             <ul style="list-style-type: none"> <li>○ Which people/groups are most represented on the committee?</li> <li>○ Which are not represented (or are underrepresented)?</li> <li>○ What patterns of participation do you see with respect to age, race, gender, first language, learning ability, etc.?</li> </ul> </li> <li>• Check at various points during recruitment on the diversity of the nominees/applicants.</li> </ul>

	<p>Prioritize additional recruitment in priority stakeholder groups that are underrepresented at weekly or monthly checkpoints</p>
<p>Are there barriers that may be preventing specific people from participating in the committee process?</p>	<ul style="list-style-type: none"> <li>• Are the committee meeting times during or after work hours? How does that impact participation?</li> <li>• Is childcare provided? How does that impact participation?</li> <li>• How can we incentivize participation?</li> </ul>

## Selection Timelines

*This resource provides some sample timelines for schools or systems to use as a starting point for the selection process.*

### January to June Sample Timeline

Project	Task	Owner	Deadline
<b>Form the Review Committee</b>	Create role and responsibility document for Review Committee	Director of Schools	1/4/19
	Determine what roles need to be represented on the Review Committee	Director of Schools	1/4/19
	Finalize criteria for Review Committee members	Director of Schools	1/7/19
	Communicate opportunity to various stakeholder groups	Director of Schools	1/7/19
	Gather applications and finalize the team	Director of Schools	1/24/19
	Email committee to determine meeting availability	Director of Schools	1/25/19
<b>Initial Team Trainings</b>	Train all Review Committee members on the standards	Instruction Partners	2/1/19
	Train all Review Committee members on the rubric and selection process	Director of Schools	2/4/19
<b>Materials Fair &amp; Consideration</b>	Host a materials fair with multiple developers and vendors to learn more about the materials	Identified member of committee	2/18/19
	Review the various possible materials	Review Committee	2/25-2/28
	Narrow down the possible curricular choices	Review Committee	2/28/19
<b>Piloting Materials (piloting one)</b>	Determine teachers, units, and timeline for pilot	Identified member of committee	3/4/19

<b>unit or a set of lessons)</b>	Train teachers on unit and lesson materials	Identified member of committee	3/8/19
	Observe teachers using pilot materials	Review Committee	3/11-4/12
	Gather feedback from teachers about strengths and challenges with curriculum	Review Committee	4/15-4/19
<b>Make the Decision</b>	Committee provides recommendation to decision-maker	Review Committee	4/19/19
	Decision-maker finalizes decision and shares with committee	Director of Schools	4/26/19
	Procure Materials	Selection Team Leader	4/26/19
	Communicate decision to teachers	Teacher leader and Review Committee	5/10/19
	Host an open forum meeting to communicate the decision and answer community and stakeholder questions about the selection process	Review Committee	5/17/19

August to June Sample Timeline

Project	Task	Owner	Deadline
<b>Form the Review Committee</b>	Create role and responsibility document for Review Committee	Director of Schools	8/2/19
	Determine what roles need to be represented on the Review Committee	Director of Schools	8/9/19
	Finalize criteria for Review Committee members	Director of Schools	8/16/19
	Communicate opportunity to various stakeholder groups	Director of Schools	8/19/19
	Gather applications and finalize the team	Director of Schools	8/19-8/29
	Email committee to determine meeting availability	Director of Schools	8/30/19
<b>Initial Team Trainings</b>	Train all Review Committee members on the standards	Instruction Partners	9/13/19
	Train all Review Committee members on the rubric and selection process	Director of Schools	9/20/19
<b>Materials Fair &amp; Consideration</b>	Host a materials fair with multiple developers and vendors to learn more about the materials	Identified member of committee	10/7/19
	Review the various possible materials	Review Committee	10/7-10/11
	Narrow down the possible curricular choices	Review Committee	10/14-10/18
<b>Observing Curriculum Implementation</b>	Observe the potential curriculum in action	Review Committee	11/4/19
	Gather data: Anecdotal information about strengths and weaknesses of the curriculum from current implementers, and student performance data	Review Committee	11/4/19

<b>Meeting with Developer</b>	Meet with the developer of the possible curricula to learn directly from the developer about the materials and what is available, as well as ask questions about how the materials align with your non-negotiable criteria	Review Committee	11/18/19
<b>Piloting Materials</b>	Determine teachers, units, and timeline for pilot	Identified member of committee	12/2/19
	Train teachers on unit and lesson materials	Identified member of committee	12/9/19
	Observe teachers using pilot materials	Review Committee	1/6-3/27
	Gather feedback from teachers about strengths and challenges with curriculum	Review Committee	3/27/20
<b>Make the Decision</b>	Committee provides recommendation to decision maker	Review Committee	4/19/20
	Decision-maker finalizes decision and shares with committee	Director of Schools	4/26/20
	Procure Materials	Selection Team Leader	4/26/20
	Communicate decision to teachers	Teacher leader and Review Committee	5/10/20
	Host an open forum meeting to communicate the decision and answer community and stakeholder questions about the selection process	Teacher leader and Review Committee	5/17/20

## Selection Leader Competencies

*This resource outlines many of the key characteristics of a Selection Team Leader.*

### **Selection Team Leader**

Typically, the school system leader (Superintendent, Director of Schools) or Chief Academic Officer appoints the Selection Team Leader. Oftentimes, this person is the system leader for the content area selecting new materials.

### **Competencies to Consider**

- Excited about the potential of a new curriculum to support teachers and students
- Possesses strong project planning and project management experience
- Understands district processes and policies in a wide variety of areas (i.e. materials selection, procurement, professional development, etc.)
- Able to communicate clearly and compellingly about the selection process
- Has sufficient time available to devote to leading the process
- Possesses deep knowledge of standards
- History of effectiveness as a teacher or leader
- Communicates well with others
- Collaborates well with others
- Able to synthesize large amounts of information
- Makes decisions strategically
- Organized; meets deadlines

## Sample Email for Launching the Work of the Selection Team

*This resource provides a sample email to be sent to the Selection Team from the Selection Team Leader. The email should set the tone for the work ahead and clearly outline the team's responsibilities.*

All –

Welcome to the Selection Team! I'm thrilled to have assembled a group with such deep knowledge, skills, and commitment to improving instruction in our district. As you well know, our community is a special place for students, teachers, and families. You also know that there is a thirst for higher-quality materials that can better support our students' learning. Each of you brings a critical perspective that will shape our curriculum selection process. Your work over the next several months is going to have incredible impacts on teaching and learning here in [district].

As a Selection Team, we will work together to design and manage a curriculum selection process that is both comprehensive and transparent. Soon we will engage with a larger committee of stakeholders, but first we need to map out our specific process and timeline. Our launch planning meeting will take place on **Tuesday, March 5th**. We will meet in the district conference room from **9:00 am - 3:00 pm**.

I look forward to kicking off this work with you! If you have any questions, please don't hesitate to email me.

Best,

[Selection Team Leader]

## Agenda for Planning the Selection Process

This resource outlines a sample agenda to guide the first meeting of the Selection Team.

Meeting goals:

- Determine how the final curriculum decision will be made
- Map the schedule of events
- Design the process for forming the Review Committee
- Plan for communicating with stakeholders

Agenda Item/Timing	Guiding Questions & Activities
Welcome (20 mins)	<ul style="list-style-type: none"> <li>• Introductions</li> <li>• Share purpose of the Selection Team</li> <li>• What are your wishes for this curriculum selection process?                             <ul style="list-style-type: none"> <li>○ Jot independently &amp; share as a group</li> </ul> </li> </ul>
Co-construct team norms (10 mins)	<ul style="list-style-type: none"> <li>• What norms do we need to guide our work?                             <ul style="list-style-type: none"> <li>○ Discuss &amp; chart agreed-upon norms</li> </ul> </li> </ul>
Process must-haves (30 mins)	<ul style="list-style-type: none"> <li>• What process must-haves exist for us (i.e. state laws, bargaining agreements, board policies)?                             <ul style="list-style-type: none"> <li>○ Discuss and record</li> </ul> </li> </ul>
Piloting a resource (45 mins)	<ul style="list-style-type: none"> <li>• Do we want to pilot materials?                             <ul style="list-style-type: none"> <li>○ Read <a href="#">Guidance on Pilots and Selection</a></li> <li>○ Discuss pros and cons for our district</li> <li>○ Plan for next steps</li> </ul> </li> </ul>
Final decision process (30 mins)	<ul style="list-style-type: none"> <li>• How will the final decision be made?                             <ul style="list-style-type: none"> <li>○ Read <a href="#">Selection Decision-Making Approaches</a></li> <li>○ Discuss best approach for our district</li> </ul> </li> <li>• When do we need to have our final decision set?                             <ul style="list-style-type: none"> <li>○ Reference <a href="#">Selection Timelines</a> to determine best timeline approach for our district</li> <li>○ Set date</li> </ul> </li> </ul>
Map schedule of events (60 mins)	<ul style="list-style-type: none"> <li>• What key events do we want to include in our selection process timeline?                             <ul style="list-style-type: none"> <li>○ Read <a href="#">Description of Selection Events</a></li> <li>○ Discuss must-haves</li> <li>○ Draft a timeline (use <a href="#">Selection Timelines</a>)</li> </ul> </li> </ul>

	document as guidance)
Review Committee (60 mins)	<ul style="list-style-type: none"> <li>• Share purpose of the Review Committee             <ul style="list-style-type: none"> <li>○ Adapt job description (reference <a href="#">Review Committee Job Description</a> for adaptation)</li> <li>○ Flag key dates/events for Review Committee on our timeline</li> </ul> </li> <li>• Recruiting and selecting the Review Committee             <ul style="list-style-type: none"> <li>○ How many committee members do we need?</li> <li>○ How can we ensure diversity?</li> <li>○ How can we communicate this opportunity?                 <ul style="list-style-type: none"> <li>▪ Discuss and determine Review Committee owner to plan next steps</li> </ul> </li> </ul> </li> </ul>
Stakeholder communication (60 min)	<ul style="list-style-type: none"> <li>• Who are our key stakeholder groups and what will they want to know?             <ul style="list-style-type: none"> <li>○ Chart key stakeholders (reference <a href="#">Stakeholders for Selection</a>)</li> <li>○ List channels of communication currently in place and channels needed</li> <li>○ Generate possible questions from each stakeholder group                 <ul style="list-style-type: none"> <li>▪ Plan next steps for communication</li> </ul> </li> </ul> </li> </ul>
Next steps (20 min)	<ul style="list-style-type: none"> <li>• Review today’s agenda and notes. Which topics need more time and/or follow up before our next meeting?</li> <li>• Create sub-committees to address unfinished topics as needed</li> <li>• Review draft timeline with owners and deadlines</li> <li>• Next meeting will be XXX and key topics will be:             <ul style="list-style-type: none"> <li>○ Review Committee selection</li> <li>○ Initial trainings</li> <li>○ Stakeholder communication</li> </ul> </li> </ul>
Closing (5 min)	<ul style="list-style-type: none"> <li>• What about this curriculum selection process excites you the most?</li> </ul>

### Guidance on Pilots and Selection

This resource provides an overview of the different options for piloting materials, as well as the design considerations for pilots.

There are two primary purposes that can drive the decision to include a pilot as part of your process, either in Phase I - Select Great Materials or in Phase II - Prepare to Launch.

Pilot Purpose	When should you use this approach?
<p><u>Phase I Pilot - Materials Selection:</u> In this phase, the pilot is used to test multiple curriculum options to inform the Selection Team’s decision about which materials to select.</p>	<ul style="list-style-type: none"> <li>There are multiple options of materials available for selection that potentially meet the selection criteria and the pilot will be used to tease out the strengths and weaknesses of the options.</li> <li>You want to create early buy-in amongst a wider range of stakeholders by engaging them in the pilot process.</li> <li>There is a longer time frame for the decision-making process that allows for a more thorough selection process.</li> </ul>
<p><u>Phase II Pilot - Prepare for Effective Implementation:</u> In this phase, the decision of which materials to select has already been made, and the purpose of the pilot is to prepare for an effective roll-out by piloting the materials to inform the overall implementation plan and iron out any kinks before a large-scale roll-out.</p>	<ul style="list-style-type: none"> <li>A decision about which materials to select has already been made.</li> <li>You are working within a large system and want to develop capacity in a wider range of stakeholders who can then support the large-scale roll-out.</li> <li>There have been implementation challenges in the past when rolling out a new set of materials, and you want to prepare for an effective implementation process.</li> <li>There is a longer time frame between when a decision is made and when roll-out can occur.</li> </ul>

For each pilot purpose, there are specific design considerations that make an effective pilot as well as potential pitfalls that can make the pilot approach challenging.

#### Pilot Design Considerations

Key Design Question	Considerations	Potential Pitfalls
<p>What is the scope of the pilot?</p>	<p>There are several ways to approach the scope of the pilot:</p> <ul style="list-style-type: none"> <li><u>Unit Selection:</u> In this approach, only 1-2 units are selected from the materials and used for the pilot. This allows for a shorter term pilot as most units span 4-6 weeks of instruction. In a Phase I pilot, this also allows the same group of teachers to pilot multiple sets of materials to compare them to one another.</li> <li><u>Multiple Units or Full Year:</u> In this approach, multiple units and/or a full year of curriculum is piloted. This is best utilized for a Phase II pilot when you are using the pilot to learn and prepare for full implementation.</li> </ul>	<p><u>Unit Selection</u></p> <ul style="list-style-type: none"> <li>It is important to be strategic about which unit is selected for the pilot. You’ll want to refer to EdReports or the curriculum evaluation conducted to select a unit that is representative of the curriculum and is of high quality.</li> <li>The unit should also be selected to fit into the current scope of sequence of instruction where possible, so teachers can see how students respond to new content from the curriculum and you’re continuing to make sure students are learning the “right stuff” in the school year.</li> </ul> <p><u>Multiple Units or Full Year</u></p> <ul style="list-style-type: none"> <li>Multiple units can be an effective strategy for a Phase II pilot because it provides you with more opportunities</li> </ul>

		<p>to learn about effective implementation.</p> <ul style="list-style-type: none"> <li>▪ A full year approach lengthens the overall selection and implementation process, making this a multi-year effort from selection to full implementation. This can be helpful as it helps to build a coalition of stakeholders invested in the process, but there is a risk of losing momentum in the process and it takes longer to address core instructional challenges.</li> </ul>
<p>Who will pilot the materials?</p>	<p>You'll want to consider:</p> <ul style="list-style-type: none"> <li>▪ Scale: How many teachers do you want to participate in the pilot? How does this fit into your broader educator engagement strategy?</li> <li>▪ Selection: How will you select teachers to participate? Will teachers opt-in to the pilot or will they be chosen? What are the expectations for participation? How will you leverage teachers/leaders who hold informal authority within your system and can help influence others?</li> </ul>	<p>Scale</p> <ul style="list-style-type: none"> <li>▪ Not involving teachers or leaders with informal authority who have the ability to influence other teachers or leaders and build their buy-in, or not involving teachers/leaders who may be harder to invest.</li> <li>▪ Phase I - You want to find the balance between more stakeholder voice in the process with being able to meaningfully learn from the pilot to inform your decision.</li> <li>▪ Phase II - It can be challenging to limit the pilot when there is greater</li> </ul>
	<ul style="list-style-type: none"> <li>▪ Individual teachers vs. teams: Do you want full teams to participate or just individual teachers?</li> <li>▪ Grade level span: Do you want to span a few grade levels? All grade levels?</li> <li>▪ Entire school: Is there one specific school that wants to pilot the materials for your system?</li> </ul>	<p>interest, but if you truly want to use the pilot to learn and prepare for an effective roll-out, it is important to keep the scale manageable so you can closely study and monitor implementation to inform your broader roll-out.</p> <ul style="list-style-type: none"> <li>▪ Oftentimes, schools choose to pursue new materials after identifying a gap in current materials. If you choose to pilot materials in certain schools or grades (versus system-wide), this means that some students will not receive access to potentially higher quality materials. Consider ways to support teachers and leaders in strengthening current materials while piloting to ensure equity as much as possible.</li> </ul> <p>Teams, Individuals, Grade Levels</p> <ul style="list-style-type: none"> <li>▪ Having full teams or an entire school engage in a pilot enables you to study the impact on other structures or systems (i.e., PLCs, professional development, etc.).</li> <li>▪ If the materials being considered have different structures in different grade</li> </ul>

		levels (i.e. K-2 materials are slightly different from 3-5, K-5 is different from 6-8, etc.), you want to be sure to pilot in each configuration.
What training or support will be provided to the teachers and/or leaders involved in the pilot?	<p>While the pilot may be limited in scope, it is essential that teachers and leaders receive some training on the materials to prepare them for implementation. This should include:</p> <ul style="list-style-type: none"> <li>An overview of the design and architecture of the materials, including how units and lessons are structured and the scope of the year.</li> <li>The key instructional practices that may be employed within the curriculum.</li> </ul> <p>Additionally, providing training in the pilot can help illuminate future training needs should those materials be selected or if you are planning a broader roll-out.</p> <p>If you are piloting multiple sets of materials, teachers and leaders will need some brief training in each set of materials to ensure they implement the materials appropriately. This can also provide insight into the quality of training offered by different publishers, which can be a factor in your decision.</p>	<p>Many pilots tend to overlook the training needs teachers and leaders have when piloting new materials.</p> <ul style="list-style-type: none"> <li>Teachers can become frustrated without appropriate training because they are unsure of how to use the materials or are not using them effectively. This can lead to teachers having a poor experience with the materials and becoming disinvested in the options.</li> <li>Leaders may hear frustrations from their teachers and become disinvested in the materials and/or not know how to support teachers to work through the challenges that emerge.</li> <li>You may not get the outcomes you want from a pilot because perceptions of the materials are influenced by the training, or lack</li> </ul>
		thereof, instead of by the materials themselves.
How will you evaluate the pilot to inform your process?	<p>Setting clear evaluation criteria and/or having a plan for learning is an essential component of any pilot.</p> <p>In Phase I pilots, this includes:</p> <ul style="list-style-type: none"> <li>The criteria by which each set of materials will be evaluated in alignment with the overall selection criteria.</li> <li>The specific questions you aim to answer through the pilot about each set of materials; this could include questions about the training required, the instructional time required to implement, the impact on specific student populations (English Language Learners, students with IEPs, etc.).</li> <li>A way to synthesize the learning from the pilot to inform the decision-making process.</li> </ul> <p>This is the most important component of Phase II pilot planning. You want to ensure that you consider the following to maximize the impact of the pilot:</p>	<p>In Phase I pilots, the potential pitfalls are:</p> <ul style="list-style-type: none"> <li>Relying solely on the perceptions and opinions of the teachers who participated in the pilot without some objective criteria.</li> <li>Looking to student achievement data to inform the decision. Most pilots are too short to have a measurable impact on student data and it will provide a false positive or false negative of the impact the materials may have.</li> </ul> <p>In Phase II pilots, the potential pitfalls are:</p> <ul style="list-style-type: none"> <li>Not working through the challenges that emerge during the pilot and engaging in continuous improvement. There is a risk of viewing it as “just a pilot” and not investing the time and energy to work out challenges in real-time to find a strong solution and leverage the pilot.</li> <li>Expecting measurable changes in student achievement data. The</li> </ul>

	<ul style="list-style-type: none"> <li>▪ The specific questions you aim to answer through the pilot. You should work through Phase II of the Curriculum Support Guide in order to test roll-out for assessment, pacing and planning, coaching, and training.</li> <li>▪ Clear roles/responsibilities and expectations for pilot implementation and for capturing and synthesizing learning.</li> <li>▪ A plan to monitor progress for the pilot, including specific times to synthesize learning aligned to each of the questions determined.</li> </ul>	<p>impact of materials on student learning can take time, and looking for measurable impact can lead to a false positive or false negative of the potential impact of the materials.</p> <ul style="list-style-type: none"> <li>▪ Not having a clear approach to synthesize and capture learning on a regular basis, so you are not able to apply the lessons learned to the full roll-out of materials.</li> </ul>
--	--	---

## Selection Decision-Making Approaches

This resource outlines different approaches for making the final materials selection.

Approach	Definition	Pros	Cons
<b>Single decision maker</b>	One person (i.e. the CAO) weighs all the information and input and makes the decision	One of the quickest and most straightforward methods	Decision may feel less transparent and Selection Committee members or other members of the system may not be invested in the decision
<b>Plurality</b>	The decision is made by the biggest group of participants	One of the quicker methods	The decision may not reflect the majority opinion of all members of the system, particularly if there are multiple good options
<b>Majority</b>	At least 50% of participants agree on the curriculum to select	Balances time and investment by larger group of members	May reduce discussion and miss out on validity of minority
<b>Consensus</b>	Majority opinion or general agreement on the will of the group	Builds investment of full group in choice and gives many opportunities to share reasoning and practice explaining position	May take more time and debate than some other options
<b>Unanimous</b>	Everyone agrees on the curriculum to select	Ensures investment of all Selection Team members	May be hard to reach and make the process take longer

## Selection Plan

*This template is a place to record projects and tasks that your team will take on during selection. Modify this to a format that works for your team. At the bottom of the template, there is a list of sample projects and tasks to help you get started.*

### Decision-Making (set in Key Action I.1.B, Plan Your Process):

Key Decision	Who is responsible for making it?	Who will consult?

### Key Stakeholders and Communications (set in Key Action I.1.E, Plan Your Process,):

Stakeholder Group	Communication Channels	Communications Needed

### Schedule of Events (set in Key Action I.1.C, Map the Schedule of Events):

Key Event (include ideal selection date)	Date

### Vision (set in Key Action I.2.B, Establish the Vision):

### Core Beliefs (set in Key Action I.2.B, Establish the Vision):

**Work Plan:** Below are descriptions of some of the terms across the top row.

- Project: describes the bucket of work; many organize projects by key action (i.e. coaching)
- Task: describes an action step in the project (i.e. determine who will lead upfront materials training)



## Email for Communicating About the Selection Process

*This resource provides sample emails -- one to teachers and one to families -- that can be shared to communicate how the selection process will go.*

Teachers --

One of the best qualities about our district is our commitment to reflection. Our rewarding, challenging, and ever-evolving work with students pushes us to step back and consider where we are and where we want to go. In recent conversations about the state of our instruction, it has become clear that we have an overwhelming desire to have high-quality, demanding, and engaging materials in the hands of teachers and students. To meet the standards and to support all of our learners, we are ready to explore the very best curriculum opportunities available to us in [subject/grade band].

The path to selecting a curriculum is an intense and exciting one. To this end, we are committed to a curriculum selection process that is comprehensive in scale and 100% transparent to all of our teachers, instructional leaders, and families.

We have carefully assembled a Review Committee from a pool of outstanding applicants. This group will lead us in the work of evaluating and deciding upon the best curriculum for our district. Our Review Committee includes principals, instructional coaches, teachers from each grade level, and parents. Every school has at least one representative on the Review Committee.

Over the next several months, the Review Committee will receive training on academic standards, develop a set of criteria to evaluate materials, select the best resources to evaluate, and test out resources in many of your classrooms. Central to the committee's work will be input from each of you, so please be ready to share your thoughts through forthcoming surveys and focus groups.

Our goal is to select a curriculum by XXX date and we will share the decision with you then. To keep you informed along the way, we will provide a brief email each month with updates on the selection process. We welcome your questions at any point along the way, so please do not hesitate to reach out.

Best,

[Director of Schools]

Families --

As a district, we are committed to reflecting on where we are and where we want to go. In recent conversations about the state of our instruction, it has become clear that we have an overwhelming desire to have high-quality, demanding, and engaging materials in the hands of our teachers and students. To meet the standards and to support all of our learners, we are ready to explore the very best curriculum opportunities available to us in [subject/grade band].

The path to selecting a curriculum is an intense and exciting one. To this end, we are committed to a curriculum selection process that is comprehensive in scale and 100% transparent to all of our teachers, instructional leaders, and families.

We have carefully assembled a Review Committee from a pool of outstanding applicants. This group will lead us in the work of evaluating and deciding upon the best curriculum for our district. Our Review Committee includes principals, instructional coaches, teachers from each grade level, and parents. Every school has at least one representative on the Review Committee.

Over the next several months, the Review Committee will receive training on academic standards, develop a set of criteria to evaluate materials, select the best resources to evaluate, and test out resources in teachers' classrooms. The committee will be seeking input from parents, so please be ready to share your thoughts through forthcoming surveys and focus groups.

Our goal is to select a curriculum by XXX date and we will share the decision with you then. We welcome your questions at any point along the way, so please do not hesitate to reach out.

Best,

[Director of Schools]

## Curriculum Selection Process

### Objectives

- Share why educators in our district decided to select a new math curriculum
- Explain how the selection process will work and who will be involved in it

2

### Why select a new curriculum?

- Students' scores on state math assessments are persistently low
- Teachers expressed concerns that our current math curriculum was not fully aligned to state standards
- Teachers are spending a lot of time finding materials online or creating materials themselves
- Teachers expressed a desire for high-quality, engaging resources

3

### Who will select the curriculum?

- A Curriculum Review Committee composed of diverse perspectives:
  - 2 principals
  - 1 assistant principal
  - 3 instructional coaches
  - 4 teachers (one from each grade level 5-8)
  - 1 parent
- Each school has at least one representative on the Review Committee

4

### How will they make their decision?

#### The Curriculum Review Committee will:

- Receive training on academic standards
- Observe classrooms
- Use feedback from educators to make a list of key criteria for selection
- Create a rubric based on the key criteria to objectively evaluate each potential curriculum
- Narrow it down to finalists
- Test the materials out in classrooms and to receive more feedback from educators

5

### When will the decision be made?

- The decision deadline is May 15, 2019

6

### What updates can be expected?

- Staff will receive a brief email each month with key updates on the selection process

7

### Questions?

8



**THANK YOU**

[INSTRUCTIONPARTNERS.ORG](http://INSTRUCTIONPARTNERS.ORG)

## Review Committee Job Description

*This resource outlines a potential job description to be shared with people interested in becoming members of the Review Committee.*

### Qualifications

- Excited about the potential of a new curriculum to support teachers and students
- Demonstrates effectiveness as a teacher or leader
- Demonstrates effectiveness in collaborating with others
- Demonstrates strong organizational practices and consistently meets deadlines
- Has sufficient time available to devote to the curriculum review process
- Willing to engage in solving challenging problems that do not have simple solutions
- Able to communicate clearly and compellingly about the curriculum review process

### Responsibilities

- Participate in all Review Committee meetings, many of which will happen outside of school hours
- Participate in training on the standards, review process, and materials
- Act as an advocate for the curriculum review and selection process
- Effectively answer questions about the review process to external stakeholders
- Take on any and all responsibilities assigned by the Review Committee leader

### Time Commitment

- Review Committee members should expect to spend at least two hours per week dedicated to the work of the committee, with an additional day dedicated to training
- While some of the work can be accomplished during the school day, much of the commitment will happen outside of school hours

### Key Meetings *(Note: this is not an exhaustive list)*

- Training on the standards, review tools, and selection process
- Classroom observations and discussions with teachers about current instructional practices
- Creation of a vision for excellent instruction in the impacted content area
- Review of curriculum finalists

## Stakeholders for Selection

*This is a list of common potential stakeholders for the selection process.*

### **District-based Stakeholders**

- Superintendent/Director of Schools/CEO
- Chief Academic Officer
- Content specialists/coaches
- School board member(s)

### **School-based Stakeholders**

- Principal
- Instructional coaches
- Teacher representatives for impacted grade levels and content area
- ELA & Math department chairs
- Interventionists
- Director of Special Education
- ELL specialist
- Union representative

### **Community-based Stakeholders**

- Union representative
- Parent representatives (i.e. PTA President)
- Student representatives (i.e. Student Body President)

## Key Messages on the Selection Process

This resource outlines criteria for key messages and sample language to reinforce about the selection and implementation process. Your key messages should include the WHY of selection and how this decision impacts various stakeholders (i.e. students, teachers, families, etc). Please note that your key messages will likely need to be modified depending on the stakeholders to whom you are messaging (i.e. families might not need extensive information around how teachers will be supported in implementation, but might be more concerned with how students are being supported).

### Key Messages

#### Selection Decision Message Criteria

- Briefly describe the history and context leading up to making the choice to select a curriculum
  - Consider highlighting data points, anecdotal reflections from teachers, students, families, etc. that illustrate the why behind this decision
- **Example Language:** *“We know that our community is a special place, and that we have established a warm and joyful culture for students, teachers, and families. The work we do is challenging and ever evolving, so it is critical to sometimes step back and take stock of where we are and where we want to go. We know that our standardized test data is not where we want it to be, but we also know that our teachers are working hard to meet the needs of all students. What we also know, from many conversations with our teachers, is that there is a desire for high-quality materials to be made available to them to better meet the demands of the standards and to support all of their students.”*
- Outline the process that was taken to make a selection
  - Explicitly outline the members of the Selection Team
  - Outline the high-level steps the Selection Team took to land on a final decision (naming who the decision maker ultimately was)
- **Example Language:** *“Materials were selected by a group of teachers, leaders, and community members who were all trained on the standards and aspects of a high-quality curriculum. They went through a rigorous process of training, observing lessons, talking with teachers, and reviewing materials to ensure that we chose the right materials for teachers and students.”*
- Name the decision that was ultimately made
  - Provide the name of the curriculum and any pertinent links or resources
  - Outline how this decision will positively impact students
- **Example Language:** *“We are excited to announce that we will be adopting X curriculum in ELA. Because we had a chance to gather input from teachers and students, we believe that these curricular choices will be the best fit for our*

*unique community. The rich and diverse selection of texts within the ELA curriculum will ensure that our students are being challenged to engage with complex texts, while still ensuring that they are seeing our population represented in those texts.”*

- Outline how this decision impacts teachers
  - Discuss the positives (i.e. materials provided, time can be spent internalizing instead of searching for resources, etc.)
  - Name the real challenges that might arise (i.e. trying to navigate how to put one’s own stamp on pre-created resources, etc.)
- **Example Language:** *“Two of the criteria we considered when deciding which direction to go were the usability and resources available to teachers. Because we heard time and again from teachers that it takes an incredible amount of time to search for quality resources to provide to our students, both chosen curricula provide detailed unit and lesson plans for teachers, with differentiation suggestions and online resources available.”*
- Outline the most important information for families to know (i.e. technology requirements, approach to homework, titles of texts, etc.)
- **Example Language:** *“Because our chosen curricular are built out for the entire school year, teachers will be sending home yearlong syllabi that will outline the main topics, texts, concepts, etc. that students will engage with throughout the year. This will allow families to have a better idea of what their child is currently reading and learning so that you can support at home as well.”*

### **Plan for Implementation & Support**

- Clearly articulate the timeline for implementation, making sure to highlight the initial trainings that will be available and the hard start date for teachers
- **Example Language:** *“We will be working throughout this spring to ensure that we have acquired all the necessary materials for an effective implementation, and teachers will have access to curricular materials during summer vacation. Teachers will have a thorough training in the new materials during our summer in-service to ensure they are ready to begin teaching the new materials at the start of the 2019 school year.”*
- Highlight the different support structures that will be put in place to support both teachers and students throughout the year (i.e. commitment to common planning, coaching and observation cycles, office hours for students, etc.)
- **Example Language:** *“Administrators and coaches will also be getting trained in the curriculum to ensure they can effectively support teachers in implementation. In addition to the initial training over the summer, teachers will have dedicated common planning time each week and weekly PLCs dedicated to lesson and unit internalization. There will also be multiple times throughout the year for teachers to provide feedback on the implementation process so that we can adjust processes/supports as needed.”*

# About Us

The Curriculum Support Guide was written and designed by Instruction Partners, an education non-profit that works shoulder to shoulder with educators to support great teaching and accelerate student learning. Our work with schools and systems is grounded in the instructional core, and we provide coaching, action planning, and professional development. In the last three years, we have observed hundreds of classrooms and been fortunate to partner with many schools and school systems. We specialize in supporting smaller school systems, who may lack capacity but are able to make big changes quickly.

**Many thanks to the Bill & Melinda Gates Foundation for their generous support of this work.**

# Thank You

FOR USING THE

**CURRICULUM**  
**SUPPORT**  
— **GUIDE** —

W O R K B O O K