



# ADMINISTRATIVE PROCEDURE

SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 4500

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CATEGORY: **Instruction, Instructional Materials**

EFFECTIVE: **10-06-75**

SUBJECT: **Materials for Instructional Use  
in Schools, General**

REVISED: **11-22-99**

## A. PURPOSE AND SCOPE

1. To outline policies and procedures pertaining to use of instructional materials in schools and to define major categories of materials.
2. **Related Procedures:**
  - Sale or disposal of district textbooks and library books ..... 2805
  - Criteria for instruction and for adoption and use of instructional materials .. 4050
  - Monitoring development and content of instructional materials ..... 4097
  - Human reproduction and venereal disease instruction ..... 4189
  - State instructional materials, K-8 ..... 4505
  - District-purchased instructional materials, K-6 ..... 4510
  - Basic instructional materials, 7-12 ..... 4520
  - Supplementary instructional materials, K-12 ..... 4521
  - Periodicals for use in schools ..... 4535
  - Instructional materials and equipment at Instructional Media Center ..... 4555
  - Library media centers, K-6 ..... 4560
  - Library media, 7-12 ..... 4564

## B. LEGAL AND POLICY BASIS

1. **Reference:** Board policy: A-5000, A-6000, B-1120, B-1170, D-2000, D-3000, D-6000, D-6700, F-1000, F-1050, F-1500, F-2050, F-5000, F-5001, F-5300, F-5310, F-5450, F-8800, H-8800, K-6500; Education Code Sections 60000-60521; 20 U.S.C., 1232h.
2. **District Policies**
  - a. **Purchased materials**
    - (1) **Quality.** It is district policy to provide students and teachers with the most effective materials available for instructional use.
    - (2) **Evaluation** of all instructional materials will be based on criteria adopted by the Board of Education (Procedure 4050). Teachers are encouraged to be involved in a continuous process of evaluating newly published materials as well as those in current use. Recommendations for acquiring new or replacement materials should be made according to appropriate procedures referenced in A.2.

- (3) **Acquisition** of recommended materials is dependent upon availability of funding.
- b. **Commercially sponsored or free materials** must meet the same criteria applied to materials purchased by the district. Materials must meet an identified educational need and be closely related to district goals. Logos and advertising must be discrete. For materials with extensive advertising, board approval must be obtained on a case-by-case basis.
  - (1) **Single-school use.** Materials offered for use at one school must be approved by the site principal prior to use.
  - (2) **Multiple-school use.** Materials offered for use in more than one school must be approved by the appropriate subject-area director or program manager. Materials with excessive advertising shall not be approved.

## **C. GENERAL**

- 1. **Originating Office.** Suggestions or questions concerning this procedure should be directed to the Educational and School Services Department, Instructional Support Services, Institute for Learning.
- 2. **Definitions**
  - a. **Materials for instructional use:** Books (text, library, and reference), multimedia materials (videotapes, CD, slides, records, and video and audiotapes), computer software (programs, diskettes, CD-ROMs), microfiche, periodicals (newspapers and magazines), maps, globes, charts, posters, and other print and nonprint materials.
  - b. **Basic instructional materials:** Materials used by most students in achieving program/course objectives. Approval for use, usually in the form of formal adoption, is granted by the Board of Education. School personnel should work closely with the appropriate subject-area program manager in planning instructional programs or courses that involve use of basic instructional materials which are neither state-adopted nor district-approved.
  - c. **State instructional materials, K–8:** Materials adopted by the State Board of Education and generally purchased with State Instructional Materials (SIM) funds (Procedure 4505). These materials also may be purchased with district or special project funds.

- d. **Supplementary instructional materials:** Materials for use by students as an additional classroom resource in achieving program or course objectives. These materials may be purchased by an individual school for that school's use or by the district for loan to individual teachers through the Instructional Media Center (IMC) Educational and School Services Department.
- (1) **Materials not approved for general use** may be purchased for use at a single school:
- (a) **Ten or fewer copies.** Upon approval of the site principal, using site funds, a school may purchase ten or fewer copies of a single supplementary instructional title if the total quantity of that item on hand does not exceed ten and such material is intended for use by individuals or small groups of students. It is a principal's responsibility to ensure that such materials have been thoroughly reviewed by teachers and that materials meet the same high standards and criteria applied to selection of materials for districtwide use. Before granting approval, a principal may contact the appropriate subject-area director or program manager for recommendations.
- (b) **Eleven copies or more.** Using site funds, a school may purchase eleven or more copies of a single supplementary title. Approval for such purchase is granted by the appropriate subject-area director or program manager and the Educational and School Services Director, upon recommendation of the site principal.
- (2) Approval of materials to be purchased for use through the IMC is granted by the Educational and School Services Director.
- e. **Waiver:** Relief from district requirements to use only approved instructional materials. A principal may request a waiver to use unapproved instructional materials by submitting a completed "Request Form for Instructional Materials" (E.2.) and receiving approval.
- f. **Library media:** A collection of print and nonprint materials for use by students and teachers as a school resource in achieving educational objectives or individual interests. These are available for self-selection as needs and interests dictate. Approval for use is granted by the site principal.
- g. **Field testing:** Use of unadopted or unapproved instructional materials on a preliminary basis or in a subset of schools to assess their effectiveness in

achieving program or course objectives. Materials may be field-tested as part of instruction in adopted or pilot programs or courses. Approval to field test may be granted by the principal for materials limited to that school site. The subject-area director or program manager or other designated district staff determine locations for field testing/piloting materials for district use. Principals are urged to involve subject-area director or program managers whenever they consider field-testing materials.

3. **Parents' Rights to Inspect Materials Used for Research and Experimentation**  
(General Education Provisions Act of 1974—20 U.S.C., 1232h)

- a. **Availability of materials.** Upon request, all instructional materials, including teachers' manuals, films, tapes, and other supplementary material that will be used in connection with any research or experimental program or project, shall be available for inspection by parents or guardians of children engaged in such a program or project. "Research or experimental program or project" means any program or project designed to explore or develop new or unproven teaching methods or techniques.
- b. **Notification.** Parents or guardians of children are notified of a research or experimental program by the administrator responsible for the program. *Pilot programs and courses and field testing of instructional materials for district adoption are exempt from this notification procedure.*
- c. **Requests.** A parent's or guardian's request to inspect instructional materials may be initiated with the principal, appropriate subject-area director or program manager, or the Educational and School Services Director.
- d. **Parent inspection of school-based instructional materials**
  - (1) The principal or designee makes instructional materials available for inspection and interprets materials to the parent or guardian.
  - (2) The principal may arrange for the appropriate subject-area director or program manager to confer with the parent or guardian regarding pertinent information related to materials inspection.
- e. **Parent inspection of IMC instructional materials**
  - (1) Upon request, the multimedia services manager (IMC) makes instructional materials available for inspection and interprets materials to the parent or guardian.

- (2) If deemed necessary, the multimedia services manager makes a report to the Educational and School Services Director.
  - f. Parents' rights to inspect materials on human reproduction and venereal disease are covered in Procedure 4189.
4. **Funding of Materials**
- a. **District** funds for purchase of instructional materials for use in schools may be available from any or all of the following budgetary sources:
    - (1) District instructional materials accounts,
    - (2) Special allocation by the superintendent,
    - (3) Transfer from general reserve by Board of Education action, and/or
    - (4) Individual school instructional accounts.
  - b. **State instructional materials.** The district allowance under the State Instructional Materials Program may be used to purchase materials for use in grades K–12.
  - c. **State, federal, and private grants.** Purchase of materials for instruction in elementary and/or secondary schools may be included in special project applications submitted to state, federal, and private funding agencies.
5. **Disposal of Obsolete Materials**
- a. **State textbooks**
    - (1) **Distribution.** Principals for grades K–8 may, at a time of their own choosing, distribute obsolete state textbooks to students or parents. All books so distributed must be:
      - (a) Obsolete *state* texts only (not district-owned);
      - (b) In sanitary and usable condition;
      - (c) Stamped “DISCARD” on the cover and title page.

It is suggested that students be given books appropriate to reading abilities and interest and that the number of books given to each child at any one time be limited.

- (2) **Discard.** The instructional materials technician prepares a “Textbook Transfer Document” (E.1.) to initiate return of obsolete state textbooks to IMC via district delivery truck. All such books or packages containing books should be marked “DISCARD.”
- (3) **Disposition.** The Instructional Materials Services Unit, Educational and School Services Department, reviews the “Textbook Transfer Document” and determines the disposition of materials listed.

b. **District-purchased materials (secondary schools)**

- (1) **Book sale.** District-owned, worn, and obsolete textbooks and library books may be sold at individual schools as outlined in Procedure 2805. Funds received from the sale of books must be deposited into the General Fund as income. To have funds budgeted in a specific school account, a notation must be added on the “District Daily Remittance Advice” form requesting that funds be appropriated to the account indicated.
- (2) **Worn, obsolete, or excess materials** not sold at a book sale, or other instructional materials that are in excess, obsolete, or worn, may be returned to IMC upon completion of the “Textbook Transfer Document” (E.1.).

6. **Contacts with Representatives of Publishers and Distributors**

- a. Subject-area directors or program managers shall consult the Educational and School Services Department staff before planning a display of publishers’ materials to ensure compliance with district policy.
- b. To minimize complaints, charges of discrimination, and possible litigation by publishing or distributing companies, it is essential that all district staff observe policies regarding communication between the district and such companies when selecting and ordering any district instructional materials.
- c. **Elementary schools.** Sales representatives are not to initiate contacts with elementary schools. All contacts regarding library media materials must be made with the Instructional Media Services Program Manager, Educational and

School Services Department; contacts regarding textbook materials must be made with the appropriate subject-area director or program manager.

7. **District Policy Regarding On-Site Interviews with Commercial Salespersons or Agents.** Commercial salespersons or agents shall not be permitted to discuss business on school premises except as provided in C.8. The intent of this policy is to:
- a. Ensure that materials evaluation efforts of classroom teachers and district curriculum personnel are properly coordinated and that recommendations submitted to the Board of Education reflect this joint effort.
  - b. Minimize time-consuming sales meetings for school personnel.
  - c. Provide fair and equitable trade for all commercial companies by giving district consideration to products without requiring personal visits to over one hundred schools.
  - d. Avoid increases in materials prices that would result from extensive sampling.
  - e. Place responsibility with district personnel for arranging appropriate exhibits and displays of instructional materials and equipment.

8. **Exceptions to District Policy**

- a. **Schools with special needs** and requirements may request authorization from the appropriate subject-area director or program manager to schedule interviews with salespersons. The director or program manager approves the request if the special need is limited to one subject.

Upon approval of a request to interview salespersons:

- (1) Educational and School Services Department personnel inform sales personnel of district policies and procedures, assist authorized schools to identify appropriate sales people, and/or plan regional or district materials/equipment displays.
- (2) The principal or designee of the school receiving the exemption may write to sales personnel to request a school visit and make appointments for on-site visits. Schools scheduling on-site interviews are encouraged to consult with the appropriate subject-area director or program manager or instructional materials supervisor about companies to include, as well as types and characteristics of various educational programs available.

- b. **Library media center (secondary schools only).** Sales representatives may contact secondary schools to request appointments with school librarians. Advance appointments are required in every case. Initial contact must be with the school office to determine whether or not the school is scheduling appointments with sales representatives.
9. **Procedures Applicable During Evaluation and Ordering Periods for Textbooks and Related Instructional Materials**

  - a. **Publishers' presentations at schools.** Publishers may not request or receive permission to present materials to district staff at school sites other than in coordination with district-sponsored activities. Principals should be cautioned that to invite or permit a presentation by one publisher would obligate them to honor requests of all publishers submitting materials for adoption. Salespersons should be referred to the appropriate subject-area director or program manager.
  - b. **Publishers' presentations at meetings.** Subject-area director or program managers may arrange to have publishers present materials at meetings to which interested district staff are invited.
  - c. **Receiving sample copies.** District staff may accept publishers' samples if they are made available to all people attending a conference or public meeting. District staff are *not* to accept sample copies of materials being piloted or under consideration (on state-approved lists or solicited from publishers) by the district. District staff should not imply in any way that receiving samples is a condition for ordering materials from a particular publisher.
  - d. **Publishers' consultant services.** After instructional materials are adopted by the district, central office staff may make arrangements with the publishers to provide consultant service in the use of those materials.
  - e. **Instructional materials and ordering.** Any questions or concerns about specific instructional materials in any adopted areas should be referred to the appropriate subject-area director or program manager or to the Educational and School Services Director. Questions about specific ordering procedures should be referred to the Educational and School Services Director.

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**D. IMPLEMENTATION** (See Section C.)

**E. FORMS AND AUXILIARY REFERENCES**

1. Library Textbook Transfer Document, Stock Item 22-L-3430.
2. Request Form for Instructional Materials (available from the Instructional Materials Services Unit, Educational and School Services Department).

**E. REPORTS AND RECORDS**

**F. APPROVED BY**

  
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For the Superintendent of Public Education