



**ADMINISTRATIVE PROCEDURE**  
SAN DIEGO UNIFIED SCHOOL DISTRICT

NO: 4505

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CATEGORY: **Instruction, Instructional Materials**

EFFECTIVE: **10-06-75**

SUBJECT: **State Instructional Materials, K-8**

REVISED: **9-24-99**

**A. PURPOSE AND SCOPE**

1. To outline policies and procedures pertaining to state instructional materials for grades K–8 and to identify district responsibilities for evaluation, adoption, selection, ordering, and management of state instructional materials.
2. **Related Procedures**

Materials for instructional use in schools, general .....	4500
Criteria for instruction and for adoption and use of instructional materials .....	4050
District-purchased instructional materials, K-6 .....	4510
Basic instructional materials, 7-12 .....	4520

**B. LEGAL AND POLICY BASIS**

1. **Reference:** Board policy: A–4520, F–5000, F–5300; Education Code Sections 1241, 51050, 60000–60315; California Code of Regulations, Title 5, Sections 9500–9504.
2. **The State Instructional Materials System** is outlined in Education Code Sections 60000–60315 and includes evaluation of materials for adoption, adoption of materials, ordering and acquisition of materials, funding, and other details. The Board of Education adopts state instructional materials in accordance with the Education Code. State-adopted materials are authorized for use in the district unless Board of Education action is taken to prohibit such use.

**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:** Print or nonprint materials used for instructional purposes, including textbooks, technology-based materials, other educational materials, and lists. Technology-based materials include, but are not limited to, software programs, video disks, compact disks, video and audio tapes, lesson plans, and databases.
  - b. **State instructional materials, K–8:** Materials adopted by the State Board of Education and generally purchased with State Instructional Materials (SIM) funds. These materials also may be purchased with district or special project funds.

- c. **State instructional materials fund:** Monies allotted annually to the district by the State Department of Education in accordance with referenced Education Code sections.

### 3. **Responsibilities**

- a. **The Educational and School Services Department Director**, in coordination with the Chief Administrative Officer, Administrative/Operational Support, manages State Instructional Materials funds and state-approved instructional materials obtained by the district through use of this fund.
- b. **Each subject-area manager**, in accordance with referenced Education Code sections, assumes responsibility and leadership for evaluation of materials in his/her subject area and develops and implements an evaluation plan.

### 4. **District Management of State Instructional Materials (SIM) Fund and State Instructional Materials**

- a. **Expenditure of funds**
  - (1) **Grades K–8:** Schools may order state-adopted instructional materials or nonadopted materials for which the state has issued a waiver authorizing the district to expend state funds.
  - (2) **Grades 9–12:** Schools may order instructional materials adopted by the local Board of Education.
  - (3) Schools wishing to order nonadopted materials can submit a waiver form.
- b. **SIM reserve.** A reserve of state instructional materials is maintained at the Instructional Media Center (IMC) to provide support for increased enrollment or unanticipated emergencies occurring during the school year. The SIM reserve includes those state instructional materials with widespread use in the district.

### 5. **Ordering State Instructional Materials**

- a. Textbook ordering workshops are held yearly for site administrators, librarians, and other staff. Order forms and ordering information are prepared and presented at these workshops to assist sites in the ordering process. Sites return completed order forms to the Instructional Materials Services Unit, Educational and School Services Department, at the IMC.
- b. Site SIM replacement orders for all state-adopted instructional materials are submitted to the Instructional Materials Services Unit at IMC on the “Book

Purchase Request (Long Form)” (E.1.). The state code number, as well as the title, should be indicated when ordering. Schools may use SIM funds allocated to SIM site accounts or other site funds and must indicate the budget charge they wish applied. Use of categorical funds must be approved by the appropriate program office.

c. **SIM Reserve**

- (1) **Ordering SIM reserve materials.** A school may order materials from the SIM reserve; the cost of materials is charged to that school’s SIM account. If a school does not have an existing balance, the cost of materials may be charged to other site accounts. Credit is allowed only for materials purchased with site funds.
- (2) **Returning unused materials for credit.** Schools may return *unused*, unstamped materials for full credit if the title(s) normally are stocked in the SIM reserve *and* quantities are reasonable. Schools should contact the Instructional Materials Services Unit.
- (3) **Returning excess materials for redistribution, discard, etc.** Excess state instructional materials may be returned at any time to IMC for redistribution to other schools, discard, or any other purpose. The principal or designee should complete a “Textbook Transfer Document” (E.2.), listing all materials and the proposed disposition, and forward the form to the Instructional Materials Services Unit at IMC.

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

**E. FORMS AND AUXILIARY REFERENCES**

1. Book Purchase Request (Long Form), Stock Item 22-R-3021.
2. Textbook Transfer Document, Stock Item 22-L-3430.

**F. REPORTS AND RECORDS**

**G. APPROVED BY**



Chief of Staff, Terrance L. Smith  
For the Superintendent of Public Education