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1. **Purpose of document**

The purpose of this document is to provide an overview of the Instructional Materials Quality Evaluation (IMQE) portal, as well as the recently launched TEA IMQE pilot and associated application process.

The pilot is optional for both publishers and local education agencies (LEAs) and will be conducted in a closed setting. It is designed to be a precursor to the official IMQE portal which will be open to the public in November 2019. Publishers participating in the pilot will not be required to participate in the official IMQE portal.

Upon completion of the pilot, TEA will provide updated communications to publishers interested in participating in the official launch of the full IMQE portal. Updates will incorporate information based both on learnings from the IMQE pilot and additional rules put forth by TEA.

Publishers should direct questions related to the IMQE pilot and portal to specialprojects@tea.texas.gov.

2. **Overview of the instructional materials quality evaluation portal**

High-quality instructional materials give teachers a strong foundation in content and pedagogy, allowing them to focus their time and energy on what matters most—bringing lessons to life for all students.

A growing body of research demonstrates that the quality of the instructional materials teachers use has a significant impact on student achievement. LEAs across Texas are eager to purchase the best materials for their teachers and students, but free information about the quality of materials can be difficult to access. Additionally, reviewing instructional materials is a time-consuming process for the teachers who serve on their LEA’s review committees.

TEA is conducting a quality evaluation of instructional materials and developing an online Instructional Material Quality Evaluation Portal to provide clear, transparent, and user-friendly information about the quality of instructional materials, using evidence captured by teams of Texas educators.

The online IMQE portal that houses the reviews will:

- provide free, transparent, and user-friendly information about the extent to which materials reflect research-based pedagogy and support the learning of all students;

- leverage Texas-specific rubrics designed by local educators and other content experts to fit the Texas
context and reflect the Texas Essential Knowledge and Skills (TEKS);

display easy-to-use reviews completed by teams of Texas educators with deep knowledge of content and pedagogy;

make it easy for LEAs to search for material based on local needs; and

may increase the ease and efficiency of LEAs’ local review processes, thereby reducing the burden on teachers and other review committee members.

This process will complement and augment the established State Board of Education’s (SBOE) TEKS coverage process. All materials reviewed for quality will also be reviewed through the SBOE’s TEKS coverage process, and the results of the SBOE process will be featured as a part of the quality reviews.

Together, these two processes are designed to provide LEAs with robust information to help them select the instructional materials that best meet their local needs. LEAs will continue to have complete autonomy to decide if, and how, they use the reviews as part of their local review and adoption processes.

**Supporting statute**

Texas Education Codes § 31.081 and § 31.082 require TEA to facilitate the independent analysis of instructional materials to evaluate their quality. The statutes require the Texas Education Agency to develop and maintain a web portal that includes the following:

- general information (e.g., price, technology requirements, etc.) for each material on the SBOE list or submitted by a publisher
- evaluation of the quality of the material and the extent to which materials cover the TEKS
- a repository of open educational resources accessible at no cost, including state-developed materials

In addition, the agency is required to contract with a private entity to conduct an independent analysis of materials in the web portal. Through a competitive process, Safal Partners was identified to be the third-party evaluator for this project.
3. Introduction to the IMQE pilot

TEA will pilot the IMQE process with English language arts and reading (ELAR) core instructional materials for grades 3–8. The goal of the IMQE pilot is to collect feedback from LEAs, publishers, and other Texas stakeholders on the IMQE process to ensure it meets the needs of Texas educators. Therefore, the pilot is designed to mirror, to the extent possible, the official IMQE portal so TEA can collect real-time, actionable feedback. This will allow TEA to hone the review process and refine the Texas-specific quality rubric which will be used to evaluate materials. It will also ensure that the information the reviews provide for the official launch of the portal is valid, reliable, and helpful to LEAs across Texas.

Publishers submitting materials for the pilot will not be required to submit materials to the official portal that will be open to the public beginning in November 2019. Upon completion of the pilot, publishers will have the following options:

- Submit materials to the public online IMQE Portal without making changes
- Update materials based on feedback from the pilot and resubmit to be reviewed for the Portal
- Withdrawal from the process without submitting to the public IMQE Portal

The pilot review for ELAR grades 3–8 will begin in January 2019. This evaluation will be conducted by Texas educators selected using TEA-approved criteria. The educators will review materials using the pilot rubric for ELAR grades 3–8.

By May 2019, the results of this pilot will be released to LEAs and publishers who have chosen to participate in the pilot. Given the goal of the pilot is to improve IMQE processes and tools based on feedback, pilot results will only be made available to publishers and LEAs who elect to participate in the IMQE pilot. The process to
launch the official IMQE portal will begin in June 2019.

Safal Partners, as TEA’s contractor for the IMQE project, is seeking publishers to submit ELAR grade 3–8 instructional materials to be one of the 45 instructional material products reviewed in the pilot. Products are defined as at least one grade level for ELAR 3–8 grade band, including all the accompanying components. One product of instructional materials must meet the following criteria:

- Cover at least one full ELAR grade (grades 3–8 for the pilot)
- Include all materials intended for student use and those intended for teacher use
- Are complete versions of the final product (either electronic copies of print materials or digital materials)
- Allow for multiple simultaneous users
- Allow for word search
- Are complete and functional for review purposes

While TEA reserves the right to accept and review any product that meets the criteria above, TEA is especially interested in publishers submitting full grade bands of several products (e.g. 3–5 and 6–8). Similarly, while not required, TEA has a preference for product submissions to be in the format of comprehensive digital material, with logins provided for reviewers.

TEA will share more information regarding the pilot in two optional webinars for publishers. To register, click the links below:

- Option 1: Wednesday, December 5, 11:30-12:30 CST
- Option 2: Thursday, December 6, 1:00-2:00 CST

**Benefits to publishers participating in the pilot**

Participating in the IMQE pilot is optional for publishers. Choosing to participate in the pilot provides publishers with the following benefits:

- Early exposure to the quality review process in a low stake setting (only pilot LEAs will see results and materials will not receive an overall score)
- Access to the completed quality reviews to easily identify areas of strength and development based on the pilot rubric
- Opportunities to provide feedback on the design and process for the IMQE pilot and IMQE Portal
- Multiple options for if and how to continue participating in this project including:
  - Submitting materials to the official IMQE Portal without changes
  - Making some updates to materials based on feedback from the pilot and resubmitting to the Portal to be reviewed again for quality and TEKS alignment
  - Withdrawing from the process without submitting to the public IMQE Portal
Key differences between the pilot and full implementation

While the intent of the pilot is to closely mirror the official IMQE portal, there are several key areas of difference between the pilot and full implementation of the portal. Most importantly, unlike the official portal, pilot reviews will only be shared with LEAs who choose to participate in the IMQE pilot. Additionally, pilot reviews will not include an overall score.

Finally, TEA reserves the right to refine the pilot materials and process during the course of the pilot based on feedback from reviewers and other stakeholders. This includes but is not limited to refinements to the ELAR grade 3–8 pilot rubric and publisher application materials. TEA will immediately notify publishers who choose to participate in the pilot of any refinements to the process, rubric, or application materials.

How submissions will be prioritized for the pilot

During the pilot phase, TEA will facilitate the independent review of up to 45 products. If more than 45 products are submitted, TEA will prioritize publisher submissions using the following criteria:

- Requests from pilot LEAs
- Requests from other Texas LEAs, stakeholders, and educators
- Number of ELAR grade levels covered by each title with those covering more grade levels receiving preference
- Current market share for the instructional materials within Texas
- Timeliness and completeness of the application
- Other factors deemed necessary to ensure pilot reviews are helpful to Texas LEAs

Once the pilot is complete in June 2019, TEA will launch the official IMQE portal. In the first review cycle of the official portal, TEA intends to facilitate the independent review of up to 90 products with results expected to be published in the fall of 2019. In this set of 90 reviews, TEA plans to review ELAR K–12 materials submitted by publishers. This includes, but is not limited to the following:

- Materials voluntarily resubmitted by publishers who participated in the ELAR 3–8 pilot (pilot publishers will have the option to update their materials before resubmitting to the portal)
- Materials from ELAR 3–8 publishers who chose not to participate in the pilot but who wish to submit materials to the IMQE portal
- Materials from ELAR K–2 and ELAR 9–12 publishers interested in participating in the Portal

Ongoing communications

TEA will work with publishers participating in the IMQE process to schedule check-ins, as needed. TEA will work with publishers to provide a single point of contact for any interim questions between scheduled check-ins.

Additionally, TEA will host two optional, informational webinars for publishers interested in the IMQE process. Click the links below to register for one of these webinars:

- Option 1: [Wednesday, December 5, 11:30-12:30 CST](#)
- Option 2: [Thursday, December 6, 1:00-2:00 CST](#)
How quality reviews overlap with the SBOE’s state adoption

The quality reviews will complement and augment the established SBOE’s adoption process. While the SBOE’s review is designed to capture what percentage of standards are met, the quality review is designed to capture how well the TEKS are addressed. Together, these two processes will provide LEAs with robust information to help them select instructional materials that best meet their local needs.

Proclamation 2019 is the most recent instance of the SBOE’s continuous review and adoption of instructional materials that publishers submit to the state. Each adoption cycle calls for specific grade bands and subjects to be reviewed. Specifically, Proclamation 2019 called for instructional materials for English language arts and reading, grades K–8; Spanish language arts and reading, grades K–6; spelling (English and Spanish), grades 1–6; handwriting (English and Spanish), grades K–5; English Learners Language Arts, grades 7–8; and Personal Financial Literacy. For more information on proclamations please reference TEA’s Proclamation page.

In accordance with Texas Education Codes § 31.081 and § 31.082, the quality evaluation process must include the TEKS coverage percentage in the final IMQE report. This means all materials reviewed for quality will also be reviewed through either the SBOE’s TEKS coverage review that occurs as part of the Proclamation process or a process that mirrors that review. The results of the TEKS coverage will be featured as a part of the quality review report.

TEA anticipates some publishers who choose to participate in the IMQE pilot will have completed the SBOE process while others may have not completed this process. TEA invites publishers in both scenarios to participate in the IMQE pilot. Refer to the brief overview below for each group’s requirements to participate in the IMQE pilot, and refer to Sections 4 and 5 for additional details.

- **Group 1: Publishers who have gone through Proclamation 2019 (the SBOE review and adoption process)** – TEA will use the assigned TEKS coverage percentage identified during the Proclamation 2019 SBOE process. Publishers that have not made changes to the materials reviewed during Proclamation 2019 will not have materials reviewed again for TEKS coverage. If a publisher chooses to submit updated version of adopted materials for the purposes of the pilot, they must follow specific procedures outlined on page 45 of the Proclamation 2019 publisher handbook order to comply with 19 Texas Administrative Code §66.75.

- **Group 2: Publishers who have not gone through Proclamation 2019** - Publishers will be required to go through the SBOE TEKS coverage reviews simultaneously with the quality reviews. Additional details may be found in the submission materials. While materials will receive a TEKS coverage percentage for the purposes of the pilot, publisher’s materials will not be added to the state adopted list of materials given the timeline for Proclamation 2019 has passed.

Pilot application timeline

Please note, the two categories of publishers referenced above will have different submission requirements depending on whether they already submitted materials as part of Proclamation 2019.

The following table summarizes the submission components and timelines for the two distinct publisher groups.
<table>
<thead>
<tr>
<th>Application Components</th>
<th>Due Dates</th>
<th>Group 1: Publishers HAVE gone through Proclamation 2019</th>
<th>Group 2: Publishers have NOT gone through Proclamation 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publishers submit feedback on the pilot rubric</td>
<td>November 15</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>Publishers submit an optional, non-binding notice of intent to participate form</td>
<td>November 16</td>
<td>Optional</td>
<td>Optional</td>
</tr>
<tr>
<td>Pilot Instructional Material Quality Evaluation (IMQE) begins. Accepted publishers establish a communication plan with TEA for ELAR review and receive a single point of contact.</td>
<td>January 2019</td>
<td>For information only</td>
<td>For information only</td>
</tr>
<tr>
<td>Publisher who have not gone through Proclamation 2019 process provide preliminary output of the correlation document to TEA for feedback</td>
<td>Draft due January 18</td>
<td>Not applicable</td>
<td>Required</td>
</tr>
<tr>
<td>Publisher who have not gone through Proclamation 2019 process submit final correlation document.</td>
<td>Final due February 1</td>
<td>Not applicable</td>
<td>Required</td>
</tr>
<tr>
<td>Publishers submit information about technology specifications and integration, professional development offerings, and cost of materials (forms available mid-January)</td>
<td>February 15</td>
<td>Required</td>
<td>Required</td>
</tr>
<tr>
<td>TEKS coverage is determined using the publisher-provided correlation document.</td>
<td>February–March</td>
<td>Not applicable</td>
<td>Required</td>
</tr>
<tr>
<td>Results of the TEKS coverage review are presented to the SBOE.</td>
<td>April 3</td>
<td>Not applicable</td>
<td>Required</td>
</tr>
<tr>
<td>Reviews are completed.</td>
<td>Late May</td>
<td>For information only</td>
<td>For information only</td>
</tr>
<tr>
<td>At the end of the pilot evaluation, publishers and pilot LEAs receive an embargoed report along with instructions for next steps.</td>
<td>By May 2019</td>
<td>For information only</td>
<td>For information only</td>
</tr>
<tr>
<td>At the end of the pilot evaluation, pilot</td>
<td>June 2019</td>
<td>For information only</td>
<td>For information only</td>
</tr>
</tbody>
</table>
Publishers have three options:

1. Submit materials to the public online IMQE Portal as is
2. Submit updated materials to the IMQE Portal based on feedback from the pilot
3. Withdrawing from the process without submitting to the public IMQE Portal

Please refer to the sections below for additional information:

Information for publishers who participated in Proclamation 2019
Information for publishers who did not participate in Proclamation 2019
4. For publishers who participated in Proclamation 2019

Materials that have been previously reviewed by state review panels and adopted as part of Proclamation 2019 will not be re-reviewed for TEKS coverage as part of this IMQE process in the pilot. The TEKS coverage percentage earned by the materials during the Proclamation 2019 review will automatically carry over to the IMQE pilot review reports. If a publisher chooses to submit updated version of adopted materials for the purposes of the pilot, they must follow specific procedures outlined on page 45 of the Proclamation 2019 publisher handbook in order to comply with 19 Texas Administrative Code §66.75.

Initial submissions

If a publisher plans to submit products to the IMQE pilot that they have already submitted through Proclamation 2019, then the publisher is only required to complete and submit the following documents to participate in the IMQE pilot:

- IMQE pilot assurances (due December 12, 2018)
- Intro Curriculum PD form (due December 12, 2018)
- Description of professional development offerings (due February 1, 2019) <form available mid-January>
- Description of technology specifications (due February 15, 2019) <form available mid-January>
- Description of product costs (due February 15, 2019) <form available mid-January>

The agreement to participate in the IMQE pilot is binding after the publisher submits the IMQE pilot assurance form.

The quality review team will work with the SBOE review team to receive all materials already submitted to the SBOE process through Proclamation 2019.

TEA reserves the right to prioritize submissions based on the criteria outlined on page 6 of this manual.

Updates to materials submitted to Proclamation 2019 SBOE process

Publishers must follow specific procedures to update content in or to offer a new edition of adopted instructional materials in order to comply with 19 Texas Administrative Code §66.75. Publishers with adopted materials should refer to page 45 of the Proclamation 2019 publisher handbook for additional information about updating those materials.

Publisher response to reviews

The pilot review cycle takes approximately four (4) to six (6) months. Before sharing reviews with pilot LEAs, TEA will send an individualized embargoed report to each participating publisher. This report will include two components:

- A completed IMQE pilot rubric, including the percent TEKS coverage that was determined through
Proclamation 2019

- A list of factual errors in the instructional materials found by reviewers

Publishers will have one (1) week to respond with the following information in a format to be determined by TEA:

- A list of factual errors the publisher identifies in the embargoed report completed by reviewers with appropriate supporting evidence
- A description of how the publisher will address each of the factual errors in the instructional materials found by reviewers
- A general response to the review

In response to information provided by publishers, TEA may:

- seek any clarification of the publisher documentation, if necessary,
- support the Texas educator review team in reassessing evidence,
- notify the publisher of any changes to the embargoed report,
- provide a revised embargoed report of the review to the publisher, and/or
- share publisher responses to reviews with pilot LEAs.

5. For publishers who did not participate in Proclamation 2019

Publishers who did not submit ELAR 3–8 materials to Proclamation 2019 but wish to participate in the IMQE pilot may do so. These materials must go through a TEKS coverage review that mirrors the SBOE process. This separate review happens on a parallel timeline to the quality evaluation to ensure the results of both processes are available in the final IMQE pilot report that will be shared with publishers and pilot LEAs. Materials that go through the TEKS coverage review outside of the regular Proclamation 2019 schedule are not eligible to be placed on the SBOE approved list given the timeline has passed.

Initial submissions

TEA reserves the right to prioritize submissions based on the criteria outlined on page 6 of this manual. TEA reserves the right to refine application documents during the course of the pilot.

All submissions required of publishers that did not participate in Proclamation 2019 include:

- Initial application (due December 12, 2018)
- IMQE pilot assurances (due December 12, 2018)
- Intro Curriculum PD form (due December 12, 2018)
- Affidavit of authorship (due December 12, 2018)
- Electronic copies of and/or digital access to materials (due December 12, 2018)
- Certification of editorial review (due December 12, 2018)
☐ TEKS and ELPS correlation document (preliminary due January 18, 2019; final due February 1, 2019)
  o Grade 3
  o Grade 4
  o Grade 5
  o Grade 6
  o Grade 7
  o Grade 8

☐ Description of professional development offerings (due February 15, 2019) <form available mid-January>

☐ Description of technology specifications (due February 15, 2019) <form available mid-January>

☐ Description of product costs (due February 15, 2019) <form available mid-January>

Submission requirements and expectations:

- Materials must be submitted in electronic form with sufficient access for three (3) to five (5) reviewers.
- Only instructional materials listed on the IMQE initial application may be included.
- No letters, promotional brochures, business cards, ancillaries, or other materials are permitted.
- Publishers may not require users to provide personal information (including, but not limited to, name, address, phone number, LEA or school name, and email address) to view online samples, and publishers may not gather information from those viewing the samples.
- Publishers may require a user to choose a username and password to register but cannot require that the username be an email address. Publishers may add a draft watermark to protect copyrighted information.
- Publishers are responsible for all expenses incurred through submission for the evaluation.

Publishers may be asked to provide a virtual orientation to materials (content, philosophy, foundational research, navigation, and other) to review teams.

Only materials that are complete for an entire school years’ worth of instruction in English language arts and reading grades 3–8 will be considered in the pilot phase. Materials should be those intended for core grade-level work.

The agreement to participate in the IMQE pilot is binding after the publisher submits the IMQE pilot assurance form.

Making Updates to Materials

During the evaluation, instructional materials may not be changed, amended, or modified. The version of the materials submitted on December 12, 2018 is the version that will be evaluated for TEKS coverage and quality.

If a publisher chooses to resubmit materials after the pilot to be reviewed in the official IMQE portal, the materials may be updated at that time.

Correcting factual errors in instructional materials

To participate in the pilot, publishers must submit a certification of editorial to confirm that they have edited all instructional materials for accuracy and content prior to submitting them for review. Factual errors in the
instructional materials found by publishers or reviewers between December 12, 2018 and the end of the pilot review period will be compiled into one document. TEA will share this document with publishers at the same time as the embargoed report. Publishers will have one (1) week to provide a description of how they will address each factual error.

At the end of the pilot phase, publishers who choose to participate in the first full implementation may resubmit instructional materials that reflect changes to what they submitted to the pilot.

Publisher response to reviews

The pilot review cycle takes approximately four (4) to six (6) months. Before sharing reviews with pilot LEAs, TEA will send an individualized embargoed report to each participating publisher. This report will include two components:

- A completed IMQE pilot rubric, including the percent TEKS coverage
- A list of factual errors in the instructional materials found by reviewers

Publishers will have one (1) week to respond with the following information in a format to be determined by TEA:

- A list of factual errors the publisher identifies in the embargoed report completed by reviewers with appropriate supporting evidence
- A description of how the publisher will address each of the factual errors in the instructional materials found by reviewers
- A general response to the review

In response to information provided by publishers, TEA may:

- seek any clarification of the publisher documentation, if necessary,
- support the Texas educator review team in reassessing evidence,
- notify the publisher of any changes to the embargoed report,
- provide a revised embargoed report of the review to the publisher, and/or
- share publisher responses to reviews with pilot LEAs.
6. Appendix

Appendix A: Application Materials

The following table summarizes the materials that each group of publishers must submit should they choose to participate in the pilot.

<table>
<thead>
<tr>
<th>Application Component</th>
<th>Publishers participating in Proclamation 2019</th>
<th>Publishers not participating in Proclamation 2019</th>
</tr>
</thead>
<tbody>
<tr>
<td>IMQE pilot assurances</td>
<td>Required; due 12/12/18</td>
<td>Required; due 12/12/18</td>
</tr>
<tr>
<td>Intro Curriculum PD form</td>
<td>Required; due 12/12/18</td>
<td>Required; due 12/12/18</td>
</tr>
<tr>
<td>Description of technology specifications (form available mid-January)</td>
<td>Required; due 2/1/19</td>
<td>Required; due 2/1/19</td>
</tr>
<tr>
<td>Description of professional development offerings (form available mid-January)</td>
<td>Required; due 2/1/19</td>
<td>Required; due 2/1/19</td>
</tr>
<tr>
<td>Description of product cost (form available mid-January)</td>
<td>Required; due 2/15/19</td>
<td>Required; due 2/15/19</td>
</tr>
<tr>
<td>Initial application</td>
<td>Already submitted through Proclamation 2019</td>
<td>Required; due 12/12/18</td>
</tr>
<tr>
<td>Affidavit of authorship</td>
<td>Already submitted through Proclamation 2019</td>
<td>Required; due 12/12/18</td>
</tr>
<tr>
<td>Electronic copies and/or digital access to ELAR 3–8 instructional materials</td>
<td>Already submitted through Proclamation 2019</td>
<td>Required; due 12/12/18</td>
</tr>
<tr>
<td>Certification of editorial review</td>
<td>Already submitted through Proclamation 2019</td>
<td>Required; due 12/12/18</td>
</tr>
<tr>
<td>Correlations to TEKS and ELPS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Grade 3</td>
<td>Already submitted through Proclamation 2019</td>
<td>Required; draft due 1/18/19, final due 2/1/19</td>
</tr>
<tr>
<td>• Grade 4</td>
<td></td>
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<td>• Grade 5</td>
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