Instructional Materials Review and Approval (IMRA) Process

0: IMRA Rubrics | Steps 1–12

Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers
1	Adopt a multi-year plan that considers future standards revisions, informing the next IMRA quality rubric subject areas and grade level/courses.				
2		Convene internal subject-area working groups to develop draft quality rubrics.			
3		Seek internal feedback from larger group of subject-area staff.			
4		• Post initial quality rubric draft(s), public comment forms, and focus group announcement online. • Share information via listservs, direct emails to known stakeholders (e.g., SBOE members, ESCs, TEKS working group members).			
5		Present draft rubric to SBOE for discussion.			
6	• Share focus group opportunities with constituents, promote public comment submission, and review and provide feedback to TEA on draft quality rubric(s). • Speak to trusted advisors about the quality rubric. • Share feedback with TEA.	If time allows, facilitate a mock review using draft quality rubric to identify areas of ambiguity and/or duplication and to provide overall feedback on the usability of the quality rubric.	Coordinate and facilitate focus groups and collect regional feedback on draft quality rubric(s).	Participate in focus groups or provide public comment.	Participate in focus groups or provide public comment.

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Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers
7		Synthesize feedback from focus groups and public comment to create and post a second draft and a memo of changes.			
8		Survey individuals who provided public comments on the impact of changes made to the second draft. Survey mock review participants on the impact of changes made to the second draft.	Survey focus group participants on the impact of changes made to the second draft.	Provide feedback on revisions.	Provide feedback on revisions.
9		Finalize quality rubric draft and submit to SBOE for approval.			
10	**BOARD ACTION:** Approve quality rubric or provide guidance to TEA for revisions.				
11.A		• If approved in **Step 10**, post final quality rubric and move to **Step 12**. • If not approved, move to **Step 11.B**.			
11.B		Revise quality rubric based on SBOE guidance and submit to SBOE for approval. (Return to **Step 10** and repeat until quality rubric is approved.)			
12		Develop quality rubric evidence guides.			Develop or revise instructional materials to align with the quality rubric in preparation for future review.

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1: Publisher Applications and Materials Selection | Steps 13–20

Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers
13	Issue a proclamation, if appropriate. See 19 TAC §67.21(b).	Issue the annual request for instructional materials (RFIM). See 19 TAC §§67.21(c)–(d).			
14	Encourage publisher participation and consider which materials might be required to participate.	• Post RFIM and advertise opportunity online and via listservs, direct emails to known stakeholders (e.g., publishers, SBOE members, ESCs). • Host publisher webinars to share the opportunity, discuss requirements, and answer questions.			• Review requirements in the RFIM (e.g., deadlines, quality and suitability rubric-alignment, etc.) and in 19 TAC §67.23. • Attend office hours to deepen understanding of requirements for participation. • If appropriate, apply to participate using the method outlined in the RFIM. • Respond to RFIM with submissions. See 19 TAC §67.23.
15		Conduct market share analysis for the subject area(s) and grade level(s)/course(s) included in the RFIM. Review applications for compliance with minimum requirements, provide feedback on readiness, and remove from consideration incomplete applications.			May withdraw RFIM application.

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Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers

16		If needed, produce a list for the SBOE of materials recommended for review using prioritization protocol:
		
		 1. Any materials required to be reviewed by the SBOE.
		 2. Materials related to the most recently revised TEKS for which a Proclamation was issued.
		 3. Open Education Resource (OER) instructional materials
		 4. Highest market share based on the most recent TEKS Certification and allotment spend data.
		 5. Voluntary publisher submissions
		    a. First year for IMRA rubric in a subject/grade level
		    b. Materials related to recently-revised TEKS
		 6. District-created submissions			

17	**BOARD ACTION:** SBOE may, by majority vote, request that materials be added to the list of materials to be included in the review cycle.	Present the market share analysis and a list of materials for review using **steps 2–6** of the prioritization protocol to the SBOE.			Publishers who were not selected must reapply to be considered for future review cycles. Return to **Step 14** in a future cycle.
18		Notify publishers of selection and communicate next steps for participation.			Finalize submission packet for IMRA review.

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Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers
19			Upon finalization and publication of the list of instructional materials selected for review, each ESC shall identify and disclose to TEA any actual, potential, or perceived conflicts of interest related to the IMRA cycle. This requirement includes, but is not limited to, contractual, financial, advisory, or partnership relationships with any publisher whose materials are included on the finalized review list for this cycle.		
20		Post any reported conflicts to the SBOE website and notify members.			

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2: IMRA Reviewer Application and Selection | Steps 21–30

Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers
21	Affirm participation in Fast Pass quality reviewer selection. See 19 TAC §67.27 (e).	Provide SBOE members with the database of individuals who have served on an IMRA review panel (only reviewers from the previous two cycles are eligible for the Fast Pass).			
22		• Open reviewer application • Post on SBOE website			
23	Share the quality reviewer application and promote with constituents.	Share information via listservs, direct emails to known stakeholders (e.g., SBOE members, ESCs, TEKS working group members), and at subject-related conferences.	Share the application with regional educators and promote participation.	Submit quality and/or suitability reviewer applications.	
24	Submit suitability reviewer appointment nominees. See 19 TAC §67.27.				
25		Contact suitability reviewer appointment nominees and request a completed application.			
26		• Confirm suitability reviewer appointment nominee eligibility and prepare a dashboard for ranking. • Confirm quality reviewer applicant eligibility, apply initial staff rating for all quality reviewer applications, and prepare a dashboard with results.			

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Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers
27	**BOARD ACTION:** • SBOE member may adjust quality reviewer rankings, veto applicants, and/or identify top candidates within the two-week selection time period for quality reviewer selection. See 19 TAC §67.27 (d). • Rank all suitability reviewer appointment nominees from most preferred to least preferred.	Share quality and suitability reviewer dashboards with the SBOE.			
	Repeat steps 21–27 as needed.				
28		Form teams using the SBOE-approved quality and suitability reviewers using rules outlined in 19 TAC §67.27 (d)(10).			
29		• Notify individuals of their appointment and execute reviewer contract. • Notify individuals not selected. • Update SBOE member dashboard with reviewer status.			Begin "no contact period," during which IMRA reviewers may not interact or communicate with publishers participating in the IMRA cycle.
	See 19 TAC §67.29 limitations on contact with IMRA reviewers now in effect.				
30		• If an individual invited to serve on a quality review panel declines the invitation, TEA will notify the relevant SBOE member.			

Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers
31	Upon notification from TEA that a quality review declined their invitation to serve, the relevant SBOE member will select an alternate from the list of candidates and notify TEA within one week.	• To the extent an SBOE member fails to select an alternate quality reviewer within one week, TEA will select the top-ranked applicant from the member's reviewer dashboard. • If an individual invited to serve on a suitability review panel declines the invitation, TEA will then invite the next eligible reviewer from the SBOE member's list.			
32		• Update reviewer status in the selection dashboards. • Inform board members of teaming completion.			

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3: Instructional Materials Reviews | Steps 33–36

Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers
33		• Notify SBOE Members of the training schedule. • Train review teams on standards alignment process, application of the IMRA Quality and laws and rules through the Suitability rubric, and identification of factual errors. • Post instructional materials being reviewed (or access information) and public comment form to TEA and SBOE website.			
	Public comment opens.				
34	• Promote public review of materials during the public comment period. • **BOARD ACTION:** conduct individual review or coordinate reviews with trusted advisors/content experts during the public comment period. • Submit formal feedback using the public comment form.	Promote public review of materials via listservs and subject-related conferences.	Promote public review of materials in region.	Review materials and provide public comment	Monitor IMRA review dashboard to view and respond to feedback.
35		• Facilitate reviews on behalf of the SBOE. • Regularly conduct cross-alignment checks across product offerings.			Monitor IMRA review dashboard to view and respond to reviewer feedback.

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Review Step	SBOE	TEA	ESCs	Stakeholders	Publishers
36	Host public hearing to hear public oral testimony regarding materials being reviewed in the current cycle. **BOARD ACTION:** State for the record any specific feedback for publishers before the final vote.	Provide an update on the review.		Register to give public oral testimony.	Respond to public testimony in their list of corrections and editorial changes before SBOE meeting.
	Public comment closes.				

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4: Appeals and Proposed Changes | Steps 37–49

Review Step	SBOE	TEA	ESCs	Reviewers	Publishers
37		Release standards alignment results to publishers, including reviewer-identified errors and feedback.			Eligible publishers submit appeals for standards alignment based on findings of the SBOE's reviewers. To be eligible to have content added, the material must, upon its initial review, be identified as meeting: • at least 75% of the TEKS or TPG coverage percentage required for approval; • and at least 75% of the ELPS required for approval.

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Review Step	SBOE	TEA	ESCs	Reviewers	Publishers
38		Release quality and suitability review findings to publishers.			• If applicable, submit quality and suitability review findings by providing new content. • All publishers are eligible for quality review appeals. They may appeal the scores and evidence for up to 25% of the quality rubric indicators. Publishers of full-subject, Tier one English or Spanish language arts and partial-subject, Tier one phonics may also appeal scores and evidence for quality rubric section 4. Phonics Rule Compliance. • All publishers are also eligible for suitability review appeals and may supply new content or revisions for all section 1 flags and for the absence of section 2 flags. • Submit publisher-initiated changes and respond to all reviewer and public errors and feedback.
39		• Facilitate publisher appeals. • Release publisher appeals submissions to review teams.		• Regularly conduct cross alignment checks across product offerings. • Reviewers consider publisher evidence, corrections, and changes.	

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Review Step	SBOE	TEA	ESCs	Reviewers	Publishers
40		• Communicate final appeals decisions to publishers and prepare final reports for SBOE. • Reports from suitability reviews will include all flags submitted by reviewers and responses received from publishers.			
41		Share Commissioner's recommendations and submit final review reports as attachments for the final SBOE vote agenda item.			• Submit publisher statement in response to the final report. • Validate the final report and confirm that there are no technical errors or inconsistencies.
42		Publish reports to IM internet website.			

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Review Step	SBOE	TEA	ESCs	Reviewers	Publishers
43	**BOARD ACTION:** COFB (Tuesday): Recommend to - place IM on the list of approved materials pending proposed revisions; - place IM on the list of proposed rejected materials; or - take no action. Full Board (Friday): Vote to - place IM on the list of approved materials pending proposed revisions; - place IM on the list of proposed rejected materials, and issue proclamation for cure period; - or, take no action.	Present final review reports and recommendations to the SBOE.			
44		Publish approved and proposed rejected list on the SBOE website and advertise via listservs and at subject-related conferences.			Begin to complete proposed revisions and corrections.
45					Submit finalized revisions and corrections.

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Review Step	SBOE	TEA	ESCs	Reviewers	Publishers
46		• Agency verifies content revisions or factual error corrections are complete. • In addition, re-certifies compliance with accessibility, manufacturing standards, interoperability, and parent portal requirements.			
47					Submit instructional materials to the National Institute Materials Access Center (NIMAC)
48		Execute and present to SBOE a final after-action review on the current year's cycle.			
49	**BOARD ACTION:** Vote to affirm the verification and act on any changes not completed by publishers.	Present verification of changes from approved programs to the SBOE.			

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5: Cure Period | Steps 50–58

Review Step	SBOE	TEA	ESCs	Reviewers	Publishers
50		Post the *Proclamation for Proposed Rejected Instructional Materials* and notify publishers.			
51		Establish reviewer teams using any reviewers who opt to extend their review contracts and assign teams to programs following steps for team building in administrative code.			Respond to the proclamation and submit required revisions to address identified deficiencies in proposed rejected programs.
52	**BOARD ACTION:** If a publisher does not respond to the proclamation with required revisions, then board acts to place those publisher programs on the List of Rejected Instructional Materials with a defined effective date before the start of the next school year. (January/February SBOE Meeting)				
53				Conduct re-review of revised materials.	
54		Release review findings to publishers.			• Submit publisher statement in response to the final cure-period report. • Validate the final cure period report and confirm that there are no technical errors or inconsistencies.
55		Release cure-period review findings to the SBOE.			

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Review Step	SBOE	TEA	ESCs	Reviewers	Publishers
56	**BOARD ACTION:** The Board takes a final vote on the instructional materials submitted during the cure period. If the Board votes to place any materials on the List of Rejected Instructional Materials, the action will include a specified effective date that occurs before the start of the next school year. (April SBOE Meeting)				
57	**BOARD ACTION**: If a program was previously on the List of Rejected Instructional Materials, and the most recent vote places the materials in the "no action" status, then SBOE **may** vote to remove the program from the List of Rejected Instructional Materials per 19 TAC, §67.43(h).				
58		Publish updated approved and rejected lists on the SBOE website and advertise via listservs and at subject-related conferences.			• If approved, go to **Step 45** of the process. • If rejected, publishers may submit materials to a future review cycle. • If SBOE takes no action, publishers may submit materials to a future review cycle.

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