



Texas Education Agency  
Division of Instructional Materials & Educational Technology

# STATE OF TEXAS PROCLAMATION 2004

## STATE REVIEW PANEL HANDBOOK

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Texas Education Agency  
Austin, Texas

# PROCLAMATION 2004 STATE REVIEW PANEL HANDBOOK

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## WELCOME

Congratulations on being chosen as a member of the State Review Panel!

On behalf of the Division of Instructional Materials and Educational Technology, we appreciate you taking time from your busy schedule to join us as part of this year's review of instructional materials. This proclamation has been a long and complex process that, with your help, will culminate with the adoption of new instructional materials for Mathematics, grades 6 – 8, Mathematics (Spanish), grade 6, Algebra I and II, Geometry, Precalculus, Mathematical Models and Applications, Advanced Placement Statistics, Advanced Placement Calculus AB, and Advanced Placement Calculus BC. Those of you in the teaching profession are well aware that it has been quite some time since we adopted new materials in these areas, so I am sure you are as eager as we are to see that the best products are adopted.

This week you will be hard at work conducting a thorough review of instructional materials. Your dedication and keen attention to detail will prove to be an invaluable asset during the review. Another important aspect of the program is the interaction and professional relationships gained by your involvement. We are confident this year's experience will prove to be just as rewarding to you.

Our staff is prepared to assist in making your stay a pleasant experience. They have committed many hours preparing for your arrival and we hope the information shared will be beneficial. Feel free to call on us if we can assist in making your stay an enjoyable one.

As you fulfill your duties this week, keep in mind this review will have a lasting impression on the children of Texas for many years to come. As a result, we thank you again for accepting our special invitation to be part of this very important process.

Sincerely,

E. Eugene Rios, Director of Review and Adoption  
Instructional Materials and Educational Technology  
Texas Education Agency

# TEXAS EDUCATION AGENCY STAFF

## Instructional Materials and Educational Technology

**Anita Givens, Senior Director, Instructional Materials and Educational Technology** –As Senior Director of the Instructional Materials and Educational Technology division at the Texas Education Agency, Anita oversees the agency’s responsibility for expanding opportunities for electronic instructional materials as well as traditional textbooks for Texas schools. Having led educational technology efforts in Texas for over twelve years, Anita provides leadership for the integration, utilization, evaluation and expansion of educational technologies through the on-going implementation of the State Board of Education’s Long-Range Plan for Technology 1996-2010. She serves on a variety of boards and committees at the state and national level, including the Board of Directors of the State Educational Technology Directors Association (SETDA), the Board of Directors of the International Society for Technology in Education (ISTE), and Education Advisor to the Partnership for 21<sup>st</sup> Century Skills. Anita’s teaching background includes teaching in the Kindergarten and 2<sup>nd</sup> grade classroom, as well as educational technology classes from elementary through graduate school. She received a Bachelor of Arts Degree in Early Childhood Education from Houston Baptist University and a Master of Science Degree in Educational Management from the University of Houston – Clear Lake.

**John Lopez, Learning Resources Manager, Instructional Materials and Educational Technology** – John Lopez is currently managing teams that oversee the activities for Distance Learning, Review and Adoption of Textbooks, Technology Applications and Special Projects with NCLB Title II, Part D technology initiatives. As a graduate from the University of Texas at Austin in 1980, Mr. Lopez holds a bachelor’s degree from the College of Communication. His career began with the Austin Independent School District as a video producer for educational programs for the Media Production Department. In 1991, Mr. Lopez started his employment with the Texas Education Agency to coordinate the activities with the satellite distance learning initiative known as the Texas State Telecommunications Access Resource (T-STAR). This technology initiative provided professional development programming and resources to educators in Texas to assist with their efforts to increase education proficiencies. John has also managed many special projects including the Texas STaR Chart System, Texas ePlan, eRate and various contracts and technology grant programs.

**E. Eugene Rios, Director of Review and Adoption** – Eugene Rios comes to the agency following his tenure with several state agencies in the area of staff development and classroom management training. While at Southwest Texas State University, School of Education, Center for Initiatives in Education, he had the opportunity to develop and provide state and national programs and in-service training for public school teachers. His presentations covered such areas as classroom management and discipline, search and seizure issues on school campuses, child abuse and neglect, and action planning for school personnel. Mr. Rios has also directed several federal grant initiatives funded by the Office of Juvenile Justice and Delinquency Prevention, U.S. Department of Education and Migrant Education. At the agency, he has assumed the duties associated with the annual review of textbook materials, publisher orientation meeting, request and review of publisher catalog pricing information for the maximum cost report, development and coordination of state review panels, arrange with publishers for shipment of instructional materials for the annual review and show cause hearings. Mr. Rios obtained his Bachelor of Arts degree from Texas Tech University. He also holds a Masters in Public Administration from Southwest Texas State University where he also received his paralegal certification.

**Loraine Blackerby, Bids and Contracts Specialist** – Loraine Blackerby has been employed with the agency since 1989. She came to TEA from the private sector where she was employed with the Art Carved Class Rings Company. Ms. Blackerby began her career at TEA with the Teacher Appraisal division before moving on to Human Resources and Budget Division. The last fourteen years, Ms.

Blackerby has been in the Division of Instructional Materials and Educational Technology working with State Review Panels and the Bids and Contracts section. She holds an associates degree in Office Systems Technology from Austin Community College. Ms. Blackerby is a native of Oklahoma City but calls Austin her home where she resides with her husband and father.

**Scott Vanya, Review and Adoption Research Specialist** – Scott Vanya has been with the agency since 2001. He uses his knowledge of computer programming to automate many of the functions within the textbook review and adoption process. He has experience in the retail and collegiate book business as well as technical writing in the computer industry. Scott holds a degree in Anthropology from the University of Texas at Austin. He was raised in Houston before moving to Austin in 1997. Scott and his wife, Jessica, have a four year-old son and a new baby daughter.

**Tiffanay Waller, Administrative Assistant, Learning Resources** - Tiffanay Waller joined the agency in 2004. As part of the Learning Resources team here at the agency, she is often juggling several projects at once including supporting the facilitation of the state review panel meetings. She comes to us from the Texas Lottery Commission where she worked for five years in the television drawings studio. Ms. Waller holds an Associates degree in Office Technology from Austin Business College and is currently a junior at Park University in pursuit of her Bachelors of Science degree in Business Management. She was born in Fargo, North Dakota and moved to Austin, Texas in the 1990's. Tiffanay now resides in her first home in Leander, Texas.

**Anita Deibert, Review and Adoption Specialist** - Anita Deibert is new to our team, having joined the Instructional Materials and Educational Technology division in January of 2006. She received her B.S. degree in Business Administration from Colorado State University and has completed additional hours of Masters of Business Administration coursework. Prior to coming to the Texas Education Agency, she worked for 19 years in an educational publishing house on a variety of projects including building budgets and on product development matters relating to contracts and rights, such as publishing agreements, permissions, and copyrights. Having worked closely with editorial and design departments, she gained an appreciation for the unique challenges educational publishers face when developing high quality, pedagogically correct material for teachers and students.

## Curriculum Division

**Norma Torres-Martinez, Director of Mathematics** – Norma has led the field of mathematics education with a strong commitment to excellence, access and equity across 16 years of service at the local, regional, state and national level. As Director of the Mathematics at the Texas Education Agency, Norma provided direction and support for the Mathematics Texas Essential Knowledge and Skills (TEKS) refinement process, resulting in their approval and implementation starting 2006-07. As a practice-based leader, Norma continues to stimulate and support math innovation and improvement at the various levels of school systems, from classrooms to campuses, districts and regions. She is currently overseeing the creation of professional development modules for implementing the refined mathematics TEKS as well as modules to support technology integration to meet state math standards. Before coming to TEA, Norma worked at Education Service Center, Region 20, San Antonio, where she focused on developing math/science campus leadership teams, supporting the implementation of standards-based curriculum, integrating technology for problem solving and using student outcome data for instructional decision-making. Along with her work in Texas, Norma works at the national level with key math professional organizations. She presided as Local Arrangements Committee Co-chair for the National Council of Teachers of Mathematics Conference in 2003 in San Antonio. As a former classroom teacher, Norma understands fully the challenges educators face but also the tremendous promise that *all* Texan children

hold. With her experience, knowledge and commitment, she provides energy, hope and direction for improving the teaching and learning of math.

**Georgina González, Director of Bilingual ESL Education** - Ms. Gonzalez was born in Quito, Ecuador, South America and spoke Czech as a first language. She is both trilingual and tri-cultural. She was Limited English Proficient herself. She has a varied educational background. She graduated from high-school in Florida, earned her Bachelor of Arts degree in New York and completed her Master of Arts degree in Illinois at 21. She also attended Karl's University in Prague to improve her Czech language proficiency. She taught at almost every grade level during her service to students abroad and in the U.S. She taught English as a Second Language, Spanish as a second language and implemented bilingual education. She was also invited as a guest lecturer to UT in Edinburg teaching "*El Proceso de la Lectura de Español*". Ms. González has developed workshops and sessions at the local, state, regional, and national levels. Prior to coming to the Texas Education Agency, she worked as Bilingual consultant at the Education Service Center, Region 13. She has been serving students for almost thirty years.

**Susie Coultriss, Assistant Director of Bilingual ESL Education** –Susie has over 33 years of bilingual professional experience and her commitment to improving teaching and learning is reflected by her dedication to addressing the cognitive, academic, social and emotional needs of linguistically diverse learners. She has served as a bilingual and ESL teacher in transitional and dual language elementary classrooms in Laredo, the Rio Grande Valley, and Round Rock (RRISD). While at RRISD, she was Assistant Director of Student Diversity and Learning Programs, Bilingual/ESOL Teacher Leader as well as Bilingual/ESOL Curriculum Integration Specialist. Ms. Coultriss' varied experiences in education range from writing district Kinder curriculum as well as grant writing that addressed parent and student literacy to piloting dual language programs. Before coming to TEA as Assistant Director for Bil/ESL, she served as a TEA grant reader, a committee member for item reviews and standards setting for various assessments such as TAKS and ExCET. Ms. Coultriss has been a member of the Executive Board for the Texas Association for Bilingual Education and presented bilingual/ESL workshops throughout the state. She is grateful for the opportunity to advocate for bilingual children across the great state of Texas.

# Section 1: ORIENTATION TO THE ADOPTION PROCESS

## INTRODUCTION

Texas is one of 22 states with a process for approval or adoption of instructional materials. The Texas Constitution, Article VII, Section 3, requires that the State Board of Education (SBOE) set aside sufficient money to provide free textbooks for children attending the public schools in the state. Selection of new instructional materials for use in the state is a process that begins when the SBOE issues a proclamation calling for bids in selected subject areas and/or grade levels. The adoption process is complete with the selection and shipment of new instructional materials to school districts.

*Proclamation 2004 of the State Board of Education, Advertising for Bids on Instructional Materials* is located in Appendix A.

## STATE LAW AND ADMINISTRATIVE RULES

Current education laws and other statutes pertaining to the operation of the public schools of the State of Texas are codified in the *Texas Education Code*. The law concerning adoption and distribution of instructional materials appears in Title 2, Chapter 31 is located in Appendix B. All rules of the SBOE are codified in Title 19 of the *Texas Administrative Code*. The rules concerning state-level adoption and distribution appear in Title 19, Chapter 66, *State Adoption and Distribution of Instructional Materials* is located in Appendix C.

## DEFINITIONS

The *Texas Education Code*, Chapter 31, contains the following definitions:

*TEC §31.002*      **Definitions**

- (1) “*Electronic textbook*” means computer software, interactive videodisc, magnetic media, CD-ROM, computer courseware, on-line services, an electronic medium, or other means of conveying information to the student or otherwise contributing to the learning process through electronic means.
- (2) “*Publisher*” includes an on-line service or a developer or distributor of an electronic textbook.
- (3) “*Textbook*” means a book, a system of instructional materials, or a combination of a book and supplementary instructional materials that conveys information to the student or otherwise contributes to the learning process, or an electronic textbook.
- (4) “*Technological equipment*” means hardware, a device, or equipment necessary for:
  - (A) instructional use in the classroom, including to gain access to or enhance the use of an electronic textbook; or
  - (B) professional use by a classroom teacher.



## LOCAL SELECTION

Publishers are required to provide descriptions of newly adopted instructional materials to all school districts and open-enrollment charter schools; however, a district retains the option of requesting one complete official sample. Publishers are responsible for all aspects of the shipment and retrieval of sample materials and bear all costs of the sampling process. The state does not guarantee return of sample instructional materials.

Each local board of trustees is responsible for determining appropriate local policy for selecting instructional materials. However, with the exception detailed in the following paragraph, only state-adopted instructional materials ratified by a school district's board of trustees will be purchased by the state for districts.

In **enrichment subjects**, school districts and open-enrollment charter schools are allowed to select non-adopted instructional materials. The state will pay the district the lesser of:

- TEC §31.101(b)*
- (1) *70 percent of the cost to the district of the textbook, multiplied by the number of textbooks the district or school needs for that subject and grade level; or*
  - (2) *70 percent of the limitation established under Section 31.025 for a textbook for that subject and grade level, multiplied by the number of textbooks the district or school needs for that subject and grade level.*

School districts electing to order non-adopted instructional materials will be responsible for the remainder of the cost. It should also be noted that the *Texas Education Code*, Chapter 31, does not allow the SBOE to reject an instructional material submission because the bid price exceeds the limit established in the proclamation. If instructional materials are adopted that exceed the maximum cost, the state's payment to the publisher will not exceed the maximum cost. School districts electing to order instructional materials with prices that exceed the maximum cost to the state will bear responsibility for the portion of the cost that exceeds the state maximum.

## ANCILLARY MATERIALS

Most publishers also provide "ancillary" materials at no cost to school districts that select their adopted materials. However, ancillary materials are not part of a publisher's bid or contract, and are not purchased by the state. Therefore, these items are not reviewed by panel members at the state level and are not adopted or sanctioned by the SBOE. Decisions regarding selection and use of free ancillary materials are entirely the province of local boards of trustees, as is the decision to purchase non-adopted instructional materials with local funds. Most districts prefer to contract at the local level with publishers to arrange that free materials will be provided during the course of the proclamation.

## DISTRIBUTION OF STATE-ADOPTED MATERIALS

Orders for new instructional materials are placed using the agency's Educational Materials (EMAT) Online System. Local adoption, requisition, and membership data are entered into an online system for verification based on the enrollment of the district and the distribution quota for the course or subject.

State-approved instructional materials are shipped from one or more of the textbook depositories. Publishers are required to have adopted materials in stock in an approved depository available for immediate shipment to districts unless they ship from a facility within 300 miles of the Texas border or if

they publish web-based instructional materials. Shipments are made to school districts throughout the summer based on the district's preferred shipment date. After the first day of school, requisitions are processed within one day of receipt and depositories are instructed to ship materials as soon as the orders are received from the agency. Districts are allowed to submit orders throughout the school year. Instructional materials are usually shipped within seven days of receipt of a requisition.

### **BRaille, LARGE TYPE AND AUDIOTAPE INSTRUCTIONAL MATERIALS**

The SBOE is authorized to acquire, purchase, and contract for free instructional materials for the education of blind and visually impaired public school students. Publishers who submit regular student instructional materials are required to provide the agency with computerized files for rapid production of adopted Braille instructional materials whenever such files are requested by the SBOE. Local school districts submit orders for Braille and large type materials to the agency, which manages acquisition from producers. Teachers who are blind or visually impaired are provided with Braille or large type teacher materials to accompany materials the teacher uses in the instruction of students.

## Section 2: STATE REVIEW AND ADOPTION

### THE ADOPTION CYCLE

The *Texas Education Code*, Chapter 31, specifies that the State Board of Education (SBOE) adopt a review and adoption cycle for subjects in the foundation and enrichment curricula. Subjects in the foundation curriculum are defined as English language arts; mathematics; science; and social studies, which consists of history, government and geography of Texas, United States, and the world. Subjects in the enrichment curriculum are languages other than English, health, physical education, fine arts, economics, career and technology education, and technology applications. Chapter 31 also specifies that the SBOE shall purchase or otherwise acquire instructional materials for use in bilingual education classes.

Chapter 31 requires that the SBOE adopt a cycle providing for a full and complete investigation of instructional materials in foundation subjects at least every six years. In addition, no more than one-sixth of the instructional materials for subjects in the foundation curriculum may be reviewed each year. Instructional materials in the enrichment curriculum shall be reviewed according to a cycle that the SBOE considers appropriate. The SBOE approves and updates the cycle for adoption of new instructional materials for foundation and enrichment subjects. A current copy of the *Adoption Cycle for Foundation and Enrichment Subjects* is included in Appendix D.

### THE ADOPTION PROCESS

The role of the state review panel is guided by the Texas Education Code. The following Texas Education Code, Chapter 31, Section 31.023 Textbooks Lists states:

*TEC §31.023(a) For each subject and grade level, the State Board of Education shall adopt two lists of textbooks. The conforming list includes each textbook submitted for the subject and grade level that meets applicable physical specifications adopted by the State Board of Education and contains material covering each element of the essential knowledge and skills of the subject and grade level as determined by the State Board of Education under Section 28.002 and adopted under Section 31.024. The nonconforming list includes each textbook submitted for the subject and grade level that:*

- (1) meets applicable physical specifications adopted by the State Board of Education;*
- (2) contains material covering at least half, but not all, of the elements of the essential knowledge and skills of the subject and grade level; and*
- (3) is adopted under Section 31.024.*

*(b) Each textbook on a conforming or nonconforming list must be free from factual errors.*

The *Texas Education Code*, Chapter 31, provides for adoption of two separate lists of instructional materials: the "**conforming**" and the "**nonconforming**" lists. Both conforming and nonconforming adopted instructional materials are eligible for purchase by the state.

Bids for new instructional materials from the publishing industry are solicited by means of a proclamation issued by the SBOE at least 24 months prior to scheduled adoption of new materials.

The proclamation identifies subject areas scheduled for review in a given year and contains content requirements based on the Texas Essential Knowledge and Skills (TEKS) adopted by the SBOE, maximum per-student costs to the state for adopted instructional materials, an estimated number of units to be purchased during the first contract year for each of the subject areas and/or grade levels, and a detailed calendar of adoption procedures.

In addition, specifications for providing computerized files to produce Braille versions of adopted materials and technical references to assist publishers in making their products more accessible are included in the proclamation. Proclamations do not specify the type or configuration of instructional materials to be submitted for review. Submissions of traditional textbooks or electronic media are allowed in all subjects in any combination of media.

Publishers who plan to offer instructional materials for adoption in the state must complete and file a *Statement of Intent to Bid*. Instructional materials may be withdrawn from the process after an intent to bid is filed, but **no materials may be added after the deadline**.

Publishers provide finished review samples of materials to the Texas Education Agency, SBOE members, each of the 20 regional education service centers, members of the appropriate state review panels, error reviewers, interested citizen groups, and to legislative requests.

The sample materials must contain identical instructional materials. In most cases, instructional materials filed by publishers are pre-publication samples, and participating publishers file lists of editorial corrections that would be made in materials adopted by the SBOE prior to distribution to school districts.

In accordance with Title 19, *Texas Administrative Code*, Chapter 66, the commissioner of education appoints members of state review panels. Nominations are solicited from the SBOE, school districts and open-enrollment charter schools, educational organizations, and interested citizens throughout the state. Members of state review panels are charged with evaluating instructional materials to determine coverage of essential knowledge and skills and factual errors.

*TAC §66.30 A person is not eligible to serve on a state review panel if, during the three years immediately preceding the appointment, the person:*

*(1) was employed by or received funds from any individual or entity in any way affiliated with a publishing company participating in the adoption under which the state review panel will evaluate instructional materials; or*

*(2) owned or controlled, directly or indirectly, any interest in a publishing company or an entity receiving funds from a publishing company.*

*TAC §66.33(a) The commissioner of education shall: determine the number of review panels needed to review instructional materials under consideration for adoption, determine the number of persons to serve on each panel, and determine the criteria for selecting panel members. Each appointment to a state review panel shall be made by the commissioner of education with the advice and consent of the State Board of Education (SBOE) member whose district is to be represented.*

*TAC §66.36(a) The duties of each member of a state review panel are to:*

*(1) evaluate all instructional materials submitted for adoption in each subject assigned to the panel to determine if essential knowledge and skills are covered;*

*(2) make recommendations to the commissioner of education that each submission assigned to be evaluated by the state review panel be placed on the conforming list, nonconforming list, or rejected;*

*(3) submit to the commissioner of education a list of any factual errors in instructional materials assigned to be evaluated by the state review panel; and*

- (4) *as appropriate to a subject area and/or grade level, ascertain that instructional materials submitted for adoption do not contain content that clearly conflicts with the stated purpose of the Texas Education Code, §28.002 (h).*

TAC §66.42 *State review panel members shall receive an orientation including at least the following:*

- (1) *the responsibilities of a state review panel member;*
- (2) *statutes and rules pertaining to the state adoption process;*
- (3) *essential knowledge and skills specified for subjects included in the proclamation;*
- (4) *identifying factual errors;*
- (5) *the schedule for the adoption process;*
- (6) *training in technology appropriate to media submitted for adoption; and*
- (7) *regulatory requirements, including the Government Code, §572.051 (relating to Standards of Conduct), and the Texas Penal Code, §36.02 (relating to Bribery). Copies of the statutes mentioned in this section shall be supplied to each state review panel member.*

TAC §66.45(a) *State review panel members shall observe a no-contact period that shall begin with the initial communication regarding possible appointment to a state review panel and end after recommendations have been made to the commissioner of education that each submission assigned to be evaluated by the state review panel be placed on the conforming list, nonconforming list, or rejected. During this period, state review panel members shall not be contacted either directly or indirectly by any person having an interest in the adoption process regarding content of instructional materials under evaluation by the panel. This restriction is not intended to prohibit members of the state review panels from seeking advice regarding materials under consideration from the State Board of education (SBOE).*

Each year, the commissioner of education determines the number and composition of the state review panels that will be appointed to review instructional materials submitted for adoption. A review panel may be assigned to consider instructional materials in more than one related subject area, and individual members of a review panel will be assigned to evaluate specific programs submitted by publishers for adoption. The commissioner of education determines the separate state review panels and members are appointed to review instructional materials submitted under the call of the current proclamation. At the time these instructions were prepared, the number of persons to be appointed to each review panel had not been determined.

A majority of members on each review panel will be classroom teachers, other school district personnel, curriculum specialists, concerned citizens, or university professors. An attempt is also made to have parents represented on the review panels. Panel members are asked to make a commitment to adhere to state laws and rules and to conduct their work within specific timeframes.

A person is not eligible for appointment to a state review panel if, during the three years immediately preceding their appointment, he or she was employed by or received funds from any individual or entity in any way affiliated with a publishing company participating in the current adoption or if he or she owned or controlled, directly or indirectly, any interest in a publishing company or an entity receiving funds from a publishing company.

State review panel members may not accept meals, entertainment, gifts, or gratuities in any form from publishers, authors, or depositories; agents for publishers, authors, or depositories; any person who holds any official position with publishers, authors, depositories, or agents; or any person or organization interested in influencing the selection of instructional materials. In addition, each review panel member observes a no-contact period that begins with the initial communication from the Texas Education Agency regarding his or her possible appointment and ends after recommendations have been made to the

commissioner of education that each submission assigned to be evaluated by the state review panel be placed on the conforming, nonconforming, or rejected list. The no-contact period for panel members who agree to review any new content submitted by publishers in response to the commissioner's preliminary recommendations will extend until final evaluations are completed. During the entire no-contact period, state review panel members must not be contacted either directly or indirectly by any publisher or any other person having an interest in the adoption process, unless directed by TEA staff.

An orientation/training session related to evaluation of instructional materials submitted for adoption will be conducted in Austin, Texas, for members of each state review panel. Exact dates for reviews are located in Appendix E. Formal publisher presentations are not scheduled to occur during the panel orientation sessions; however, publishers are invited to attend and may be called upon to respond to questions about their submission. The no-contact period will be in effect during the orientation session. A detailed schedule of the orientation/training sessions will be forwarded to prospective panel members as soon as meeting arrangements related to the date, time, and location are finalized.

During the orientation/training sessions, Texas Education Agency staff will highlight responsibilities of the state review panel members, statutes, rules, the schedule for the adoption process, and other information applicable to every review panel. Web links to the statutes and rules can be found in Appendices F and G. A listing of TEA staff involved with the review process is provided at the beginning of this handbook. During the orientation/training session, panel members will also receive training in the Texas Essential Knowledge and Skills (TEKS). Panel members will receive specific assignments of materials to evaluate. State review panel members will utilize computers to conduct a thorough review of publisher materials. As a result, they will also receive training in the use of computer software applications necessary to review instructional materials they have been assigned.

It is likely that each submission will be reviewed by three to four panel members. In accordance with SBOE rules, participating publishers must file one complete sample copy of programs offered with each member of the panels that have been assigned to review their company's materials. Names and addresses of panel members may be provided to publishers as soon as possible after appointment by the commissioner has been made and review assignments finalized. In addition, publishers will receive specific instructions on when the instructional materials should be delivered to the panel members. Publishers will also be asked to ship instructional materials directly to the meeting location. Publishers will electronically file a copy of their correlation(s) with the Texas Education Agency. The Texas Education Agency will provide the correlation(s) to state review panel members at the appropriate time.

## **SAMPLE INSTRUCTIONAL MATERIALS**

*TAC §66.54(a) Samples of student and teacher components of instructional materials submitted for adoption shall be complete as to content and representative of finished-format binding.*

In accordance with the schedule contained in the current proclamation of the SBOE, each publisher is to provide complete sets of sample textbooks/instructional materials to the Texas Education Agency, regional educational service centers, and each member of the state review panels. In addition, each publisher is to provide a complete set of correlations to the Texas Essential Knowledge and Skills (TEKS) to the Texas Education Agency and regional educational service centers. Publishers should remember that all samples provided to the agency, the education service centers, members of state review panels, error reviewers, and/or to the SBOE must contain identical instructional materials. Panel members will only review instructional materials submitted as part of the Statement of Intent to Bid.

*TAC §66.54(e) One sample copy of each student and teacher component of an instructional materials submission shall be filed with each member of the appropriate state review panel on or before the date specified in the schedule for the adoption process. To ensure that the evaluations of*

*state review panel members are limited to student and teacher components submitted for adoption, publishers shall not provide ancillary materials, supplementary materials, or descriptions of ancillary or supplementary materials to state review panel members.*

The Schedule of Adoption Procedures for the proclamation establishes deadlines for submission of sample textbooks/instructional materials to members of the appropriate state review panels. Publishers will be directed to send copies of their materials to a location in Austin where panel members will conduct on-site evaluations of materials under consideration. In addition to shipping materials to an Austin location, some panel members may receive samples of textbooks/instructional materials at their residence prior to the orientation/training sessions. Sample textbooks/instructional materials will be shipped during the months of May and June. Further details regarding samples for panel member reviews will be forthcoming. A current list of all textbooks/instructional materials for each subject area submitted under the call of the current proclamation is provided in Appendix I.

Each panel member should receive one complete sample (including student and teacher components, as applicable) of each of the textbooks/instructional materials you will be assigned to review. All boxes or packages in which sample instructional materials are shipped should be clearly marked "**Samples for the 2006 Textbook Adoption.**" Please remember that SBOE rules provide that only instructional materials officially submitted for adoption on the *Statement of Intent to Bid* may be provided to state review panel members. No letters, promotional brochures, business cards, or other materials representing a publishing company may be distributed by participating publishers to any state review panel member.

An assignment to review publishers' instructional materials will be received by each panel member. Some panel members will receive assignments to review several publishers' instructional materials. Panel members will only be responsible for reviewing those programs that they have been assigned. A set of instructional materials will be provided for your use during the review in Austin.

Any failure of a publisher to provide appropriate sample materials by the deadline should be reported to the Review and Adoptions Unit of the Division of Instructional Materials and Educational Technology. The unit will contact publishers to resolve any discrepancies. This process will ensure that the no-contact period is observed properly.

*TAC §66.54(i) Publishers participating in the adoption process are responsible for all expenses incurred by their participation. The state does not guarantee return of sample instructional materials.*

In previous adoptions, it has been standard practice that review panel members kept or donated instructional materials once they have been evaluated. However, as the number of electronic products submitted for consideration has increased, some publishers have asked panel members to return the materials. Although publishers are not guaranteed the return of the materials by panel members, we ask that you honor their request under the following circumstances: the publisher provides complete written instructions for returning the materials upon delivery of the materials to you; the publisher provides shipping materials and labels for prepaid or collect shipment.

A publisher's request to return materials should not cause you to refrain from completing a thorough evaluation, including marking pages in print components. Materials should not be returned until after the November 2006 SBOE meeting during which time review panel evaluations may be considered. Under no circumstances shall samples be sold.

## **PUBLIC ACCESS TO SAMPLE INSTRUCTIONAL MATERIALS**

*TAC §66.54(b) Four sample copies of the student and teacher components of each instructional materials submission shall be filed with each of the 20 regional education service centers (ESCs) on or*

*before the date specified in the schedule for the adoption process. These samples shall be available for public review. Publishers of Internet-based instructional content submitted for review shall provide the ESCs with appropriate information, such as locator information and passwords, required to ensure public access to their programs throughout the review period.*

In accordance with the schedule contained in the current proclamation of the SBOE, each publisher is to provide four complete official sets of sample textbooks/instructional materials and correlations to Texas Essential Knowledge and Skills (TEKS) submitted for adoption with each of the 20 regional education service centers. Publishers should remember that all sets of samples provided to the agency, the education service centers, members of state review panels, error reviewers, and/or to the SBOE must contain identical instructional materials. All samples submitted shall be complete as to content and representative of the finished product. Sample textbooks/instructional materials will be shipped to the ESCs during the month of April. For actual deadline dates for shipping of sample textbooks/instructional materials and correlations to the TEKS, refer to the Schedule of Adoption Procedures shown on pages ii-vii of *Proclamation 2004 of the State Board of Education* in Appendix A.

TAC §66.57(b) *Public access to samples.*

- (1) One sample of all instructional materials under consideration for adoption shall be retained in each ESC for review by interested persons until notification is received from the TEA. Any additional samples shall be made available to be checked out according to rules established by each ESC based on demand. Appropriate information, such as locator information and passwords, shall be made available by the ESCs to ensure public access to Internet-based instructional content throughout the review period.*
- (2) Regional ESCs shall ensure reasonable public access to sample instructional materials, including access outside of normal working hours that shall be scheduled by appointment.*
- (3) On or before the date specified in the schedule for the adoption process, each ESC shall issue a news release publicizing the date on which sample instructional materials will be available for review at the center and shall notify all school districts in the region of the schedule.*

At least four complete sample sets of instructional materials and correlations should be shipped to the designated persons at each of the 20 regional education service centers by the deadlines stated above. A list of the 20 regional education service centers is contained in Appendix J along with staff and contact information. It is suggested that anyone planning to visit any center verify the review hours and exact address before going.



## PUBLIC COMMENT ON INSTRUCTIONAL MATERIALS

Samples of all materials under consideration for adoption are provided to each of the regional education service centers for public review. Texas residents will be allowed to file written comments regarding instructional materials submitted for adoption. However, since state review panel members have no authority to reject materials or to recommend changes to materials under consideration, no public hearings will be held before the panels. Public hearings will be held before the SBOE in advance of the scheduled adoption. Publishers will be given the opportunity to respond orally or in writing to any comments made by the public.

TAC §66.60(a) *Written Comments.*

- (1) *Any resident of Texas may submit written comments for, against, or about any instructional materials submitted for adoption.*
- (2) *Written comments and lists of factual errors shall be submitted to the commissioner of education on or before the deadlines specified in the schedule for the adoption process.*
- (3) *Copies of written comments and lists of factual errors shall be provided to the State Board of Education (SBOE), participating publishers, regional education service centers (ESCs), and persons who have filed written requests.*

TAC §66.60(b) *Public hearing before the SBOE. On a date specified in the schedule for the adoption process, the SBOE shall hold a hearing on instructional materials submitted for adoption that may, at the discretion of the SBOE chair, be designated an official meeting of the SBOE.*

- (1) *Testimony at the hearing shall be accepted only from residents of Texas. Copies of speeches made at the hearing may be distributed to SBOE members. No other written material may be distributed during the hearings. Persons who wish to testify must notify the commissioner of education on or before the date specified in the schedule for the adoption process. The notice must identify the subject areas and titles about which testimony will be presented. The SBOE may limit the time available for each person to testify.*
- (2) *Oral responses to testimony at the hearing may be made by official representatives of publishing companies who have requested time to present responses on or before the date specified in the schedule for the adoption process.*
- (3) *The commissioner of education shall have a complete record of the hearing made and transcribed. The transcript of the hearing shall be provided to the SBOE, ESCs, participating publishers, and persons who have filed written requests. The official record shall be held open for 14 calendar days after the close of the hearings. During this period, any person who participated in a hearing before the SBOE and any official representative of a publishing company may submit a written response to written comments and/or oral testimony presented at the hearing.*
- (4) *Within 10 days after the record is closed, the commissioner shall send copies of responses to written and/or oral testimony to members of the SBOE, ESCs, participating publishers, and persons who have filed written requests.*

Any resident of Texas is allowed to provide written comments for or against any instructional materials submitted for adoption. The Schedule of Adoption Procedures of the current proclamation contains deadline information for submitting official written comments.

Texas residents may also elect to participate in the public hearing(s) that may be held before the September 2006 SBOE meeting. Citizens wishing to appear at a public hearing will need to submit a request. If testimony is to be offered regarding instructional materials submitted by a publishing company, time for an oral response during the hearing will automatically be scheduled unless notification is provided to the Division of Instructional Materials and Educational Technology that no representative of that company will attend. The public hearing will be transcribed and a copy will be provided to that

publisher. The official record shall be held open for 14 calendar days after receipt of the transcript by the publisher. During this period, publishers may submit a written response to the written comments and/or the oral testimony presented at the hearing.

Copies of written comments, transcript of the public hearing, and written responses filed on or before the deadline will be available for distribution to members of the SBOE, state review panels, regional education service centers, affected publishers, and persons who have filed written requests. Copies of these documents will also be available on the Division of Instructional Materials and Educational Technology web page of the TEA website.

Final oral testimony will be presented to the SBOE during the meetings scheduled for September. Texas residents desiring to appear at the last public hearing before the SBOE are to request to do so prior to the SBOE September meeting. State review panel members are not required to participate in the public hearing.

Deadlines for interested citizens to submit official written comments, for scheduled public hearings, and for requests to appear at a public hearing(s), can be located in the Schedule of Adoption Procedures shown on pages ii - vii of *Proclamation 2004 of the State Board of Education* in Appendix A.

Publishers will be allowed an opportunity to respond to written and oral comments.

## THE PRELIMINARY RECOMMENDATION

The state review panel shall submit to the Texas Education Agency evaluations of the programs bid for adoption according to the following Texas Administrative Code:

*TAC §66.63(a) The commissioner of education shall review all instructional materials submitted for consideration for adoption. The commissioner's review shall include the following:*

*(1) evaluations of instructional materials prepared by state review panel members, including recommendations that instructional materials be: placed on the conforming list, placed on the nonconforming list, or rejected;*

*TAC §66.63(b) Based on the review specified in subsection (a) of this section, the commissioner of education shall prepare preliminary recommendations that instructional materials under consideration be: placed on the conforming list, placed on the nonconforming list, or rejected. According to the schedule for the adoption process, a publisher shall be given an opportunity for a show-cause hearing if the publisher elects to protest the commissioner's preliminary recommendation.*

At the close of the review period, panel members will submit evaluation instruments and lists of factual errors to the commissioner of education.

Publishers will be allowed to submit changes, additions, or deletions to their submissions in response to the commissioner's preliminary report. Changes will only be allowed that correspond to specific TEKS not addressed in the publisher's original submission. Publishers will be allowed to request show-cause hearings in the event that they elect to protest the commissioner's initial recommendations.

Following each review panel meeting in June, the commissioner of education will issue preliminary recommendations that instructional materials under consideration be placed on the conforming list, placed on the nonconforming list, or rejected. The Commissioner's preliminary recommendations will be based upon the compilation and analysis of all data submitted by the state review panel members.

Upon receipt of the commissioner's preliminary recommendations, several options are available to publishers. These options include: (1) agree with the recommendations, (2) disagree with the recommendations and provide documentation of coverage of TEKS in the original submission, (3) submit new content to cover TEKS considered not addressed in the original submission, (4) submit written notification to the commissioner of education seeking official withdrawal of textbook materials from further consideration under the review process, or (5) any combination of the previous options.

Ten days following receipt of the preliminary reports, publishers will submit changes, additions, or deletions to the original submissions. Any submissions of new content are to be submitted in “finished-product” format with a precise description of where the new content will be incorporated into the original submission. The new content submissions will be reviewed by state review panel members who will review material(s) and submit the results of their evaluations.

Publishers who elect to protest the commissioner's preliminary recommendations may file requests for show-cause hearings.

### **THE FINAL RECOMMENDATION**

When the review process concludes, the commissioner of education shall submit to the SBOE a final report according to the following Texas Administrative Code:

*TAC §66.63(c) The commissioner of education shall submit to the State Board of Education (SBOE) final recommendations that instructional materials under consideration be: placed on the conforming list, placed on the nonconforming list, or rejected.*

In October 2006, after consideration of final evaluations submitted by state review panel members, documentation provided by publishers to indicate coverage of the TEKS in original submissions; evaluations of new content submitted after the preliminary report; results of show-cause hearings and request for official withdrawal from the state review process, the commissioner of education will submit a final report to the SBOE recommending that instructional materials submitted be placed on the conforming list, placed on the nonconforming list, or rejected.

A report detailing factual errors to be corrected in instructional materials will also be submitted to the SBOE for action. A publisher who continues to disagree with the commissioner's final recommendations will be allowed the opportunity to formally withdraw a submission at this point in the process.

The SBOE will consider the commissioner's final recommendations at their November meeting.

## Section 3: TEXAS ESSENTIAL KNOWLEDGE AND SKILLS (TEKS) AND FACTUAL ERRORS & CHANGES

### A. TEXAS ESSENTIAL KNOWLEDGE AND SKILLS (TEKS)

#### GENERAL INFORMATION

In May 1995, the 74th Texas Legislature passed Senate Bill 1, establishing a new Texas Education Code, directing the SBOE to adopt “Texas Essential Knowledge and Skills” for the required curriculum of the state. This curriculum must have two components:

- **Foundation curriculum** that consists of English language arts, mathematics, science, and social studies.
- **Enrichment curriculum** that consists of languages other than English, health, physical education, fine arts, economics, agricultural science technology, business education, health science technology, family and consumer science education, technology education, marketing education, trade and industrial education, and technology applications.

Recent legislation has expanded coverage of the TEKS to the enrichment curriculum. Effective September 1, 2003, Senate Bill 815 now requires school districts to provide instruction in the TEKS at appropriate grade levels for all subjects in the foundation and enrichment curriculum beginning with the 2003-2004 school year.

The focus of the TEKS is to articulate what students should know and be able to do rather than emphasize how teachers should teach. The TEKS were developed by teams of specialists in each content area. Team members included teachers, curriculum specialists, college faculty, business representatives, and parents. TEKS were reviewed by the public and by the SBOE. From January through July 1997, the SBOE held work sessions and public hearings on the TEKS, directing additional changes. The TEKS were adopted in April and July 1997. They can be found at [www.tea.state.tx.us/teks/](http://www.tea.state.tx.us/teks/).

The organization of the TEKS follows a common format:

- **Introductions** state the fundamental concepts that comprise each content area and contain a statement on how students can use the concept.
- **Knowledge and Skills** articulate what all students need to know and be able to do.

The Division of Curriculum has further dissected the TEKS (Knowledge and Skills) into smaller Student Expectations, and individual parts or Breakouts. These individual parts have been included as individual lines on the evaluation instrument. You are responsible for indicating on the evaluation instrument whether each individual line, i.e. breakout, is addressed. The complete line composed of TEKS, Student Expectation and Breakout must be addressed.

An instructional material’s final recommendation, i.e. conforming, nonconforming, or rejected, is based on the percentage of student expectations addressed over total student expectations. If one or more of the **breakouts** of a student expectation is not addressed, the student expectation overall is considered **NOT** addressed. Please pay careful attention to the wording of the Student Expectations. (Curriculum will discuss the breakouts further during the training session). For example:

- Words like a **AND** b and words like **INCLUDING** mean both a **and** b have to be addressed for the breakout to be addressed.

- Words like a **OR** b and words like **SUCH AS** or **e.g.** require that **one** but not both be addressed for the breakout to be addressed.
- If the expectation states “use formulas” but the lesson only provides a definition, then the expectation is not present in that lesson.

A Question and Answer Document was also developed in response to specific questions raised regarding the proclamation. The Question and Answer Document (see Appendix K) was provided for publishers' use as they developed their programs. Review these documents carefully prior to beginning your evaluation.

## THE REVIEW AND EVALUATION PROCESS

A structured review and evaluation process will be used by each review panel to check for coverage of the TEKS in the instructional materials. This process will ensure that all materials are reviewed consistently and methodically (see Figure 1 for an overview). During the orientation session conducted by the curriculum director, definitions and other pertinent information will be discussed to help panel members review each student expectation from the same point of reference.

**Figure 1. Overview of the Review and Evaluation Process**

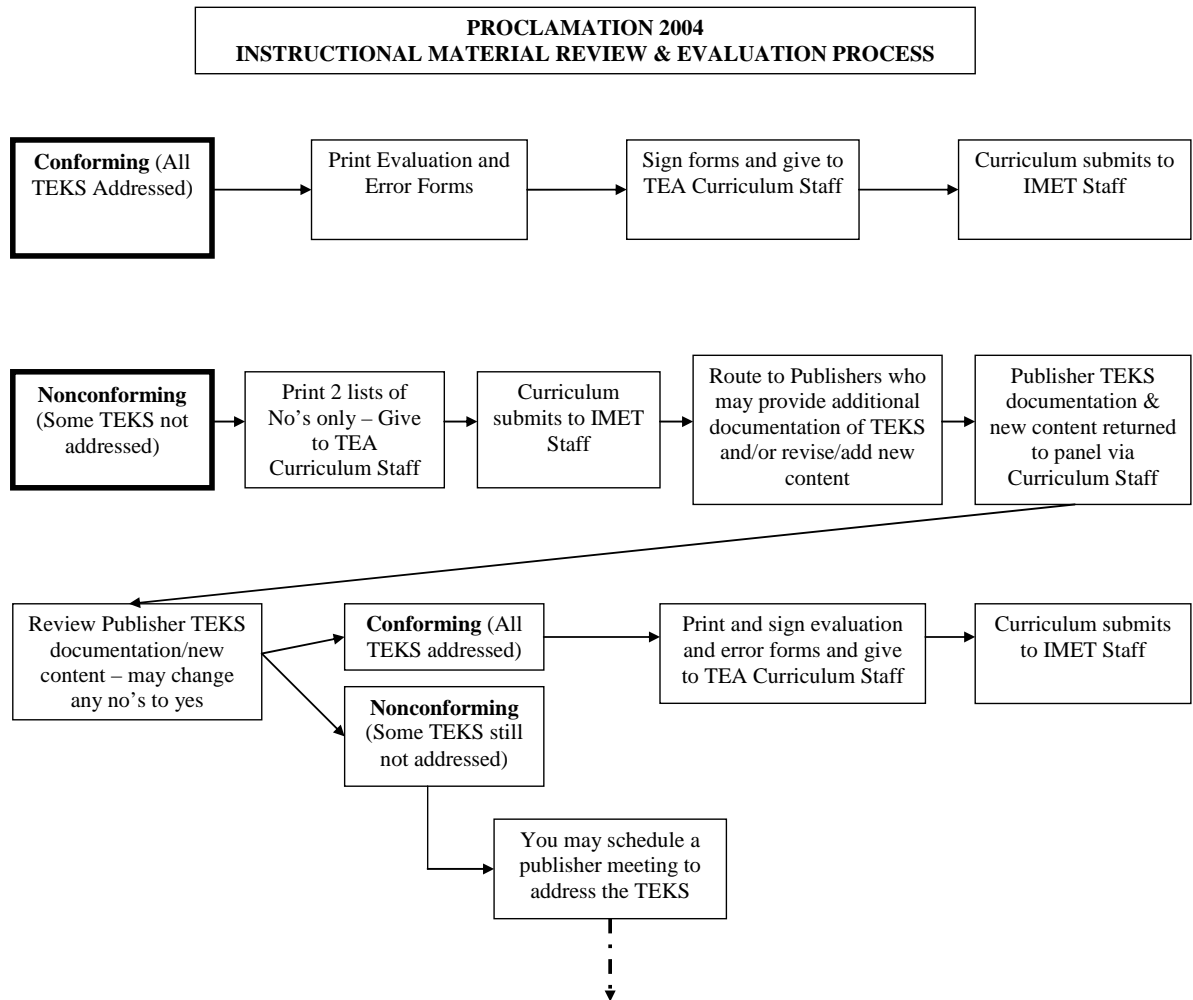
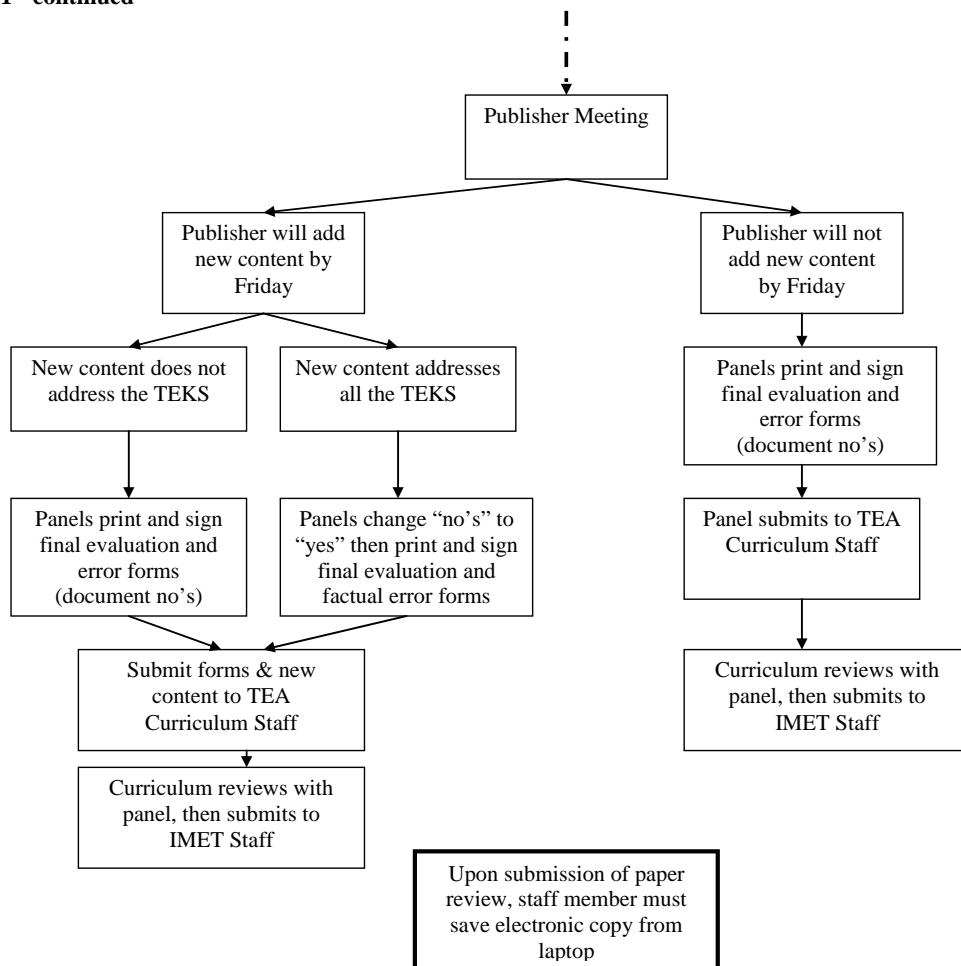


Figure 1 - continued



Be aware that your responses are subject to review under Chapter 552, Texas Government Code, Public Information Act. A web link to this chapter is provided in Appendix L. You will consult with other members of your team as you evaluate products. Panels are required to work together in an assigned open meeting space. The web site for the law concerning open meetings is provided for you in Appendix M.

Panels will review the instructional materials in conjunction with the publisher correlations noting on the evaluation instrument where each TEKS has been covered or if the TEKS has not been covered. less than 100% of the TEKS have been addressed, panels will print a “no’s” report of the TEKS not addressed. The IMET staff will then give this report to the publishers.

At that time, the publisher may provide additional information such as new citations of TEKS coverage or even submit new content for review. When the panel receives the publisher’s response from IMET staff, members will meet and discuss the information provided. You may change your recommendation based on the new information. If you do not change your decision, IMET staff will schedule a meeting to allow the publisher to discuss TEKS in question.

If a publisher of a nonconforming or rejected product cannot submit new content at the meeting, they have 10 calendar days after the receipt of the commissioner’s draft preliminary report to submit new content. Panel members should be prepared to receive this new content at their homes for review.

Panels will complete a separate evaluation instrument for each assigned instructional material. Staff members will install electronic folders for the subjects the panels review along with other materials at the end of the orientation and training session. The electronic folder includes Microsoft Excel spreadsheets “evaluation instruments” and Identification of Error and Correction templates for each of the assigned programs. Publisher correlations in print format will be distributed at that time.

Review the correlations and the materials and note on the evaluation instrument a minimum of three locations (a maximum of five are suggested), including component, page and location on the page, where the TEKS is covered.

If the TEKS is not addressed at least three times, then enter “no” under the column “Is the TEKS Addressed?”. If you believe the expectation is not addressed, use the comment section to document your findings, ex. “The publisher claimed this TEKS expectation was addressed in the Student Edition on page 12. I disagree the use of a definition is not adequate coverage.” Your entries will wrap and the rows will increase in height to accommodate up to 900 characters.

## **DEFINITIONS AND FEATURES**

The following definitions are organized according to appearance in the review process.

### **I. PER INSTRUCTIONAL MATERIAL PROGRAM**

<b>PROGRAM:</b>	The set of instructional materials composing one submission, ex. a teacher edition, a student edition, blackline masters and a student workbook together compose one program.
<b>WORKSHEET:</b>	A single table, commonly known as a spreadsheet. All forms include only one worksheet.
<b>CHAPTER:</b>	The Texas Essential Knowledge and Skills (TEKS) Chapter, content area, as listed on the TEKS website at <a href="http://www.tea.state.tx.us/teks">www.tea.state.tx.us/teks</a> .
<b>SUBCHAPTER:</b>	The TEKS Subchapter as listed on the TEKS website at <a href="http://www.tea.state.tx.us/teks">www.tea.state.tx.us/teks</a> .
<b>COURSE:</b>	The specific course as listed on the TEKS website <a href="http://www.tea.state.tx.us/teks">www.tea.state.tx.us/teks</a> , the Proclamation, the Statement of Intent to Bid, and the Instructional Materials Bid for Adoption reports.
<b>ISBN/ID:</b>	The International Standard Book Number or the unique identifying number used on the program as a whole.
<b>PUBLISHER:</b>	The name of the company that is submitting the program.
<b>PROGRAM TITLE:</b>	The title of the program.
<b>ISBN:</b>	The International Standard Book Number or identifying number (ID) of the program.
<b>PANELISTS NAMES:</b>	The first initial and last name of the panelists reviewing the program.

**TOTALS SECTION:** The totals, ex. Total Student Expectation Not Addressed, etc., automatically calculated as the responses are entered in the form.

## **II. TEKS/STUDENT EXPECTATION/BREAKOUT**

**COMPONENT ISBN/ID:** The International Standard Book Number or the unique identifying number (ID) used on the instructional material's Statement of Intent to Bid for the individual component of the bid, ex. a student workbook, ISBN 0123456789.

**PAGE(S):** The print or electronic page(s) where the reference is located. For software, web-based or video products enter the section or activity name. For video products also include the time stamp. Do not include the word or abbreviation for "page" in this column. In other words, do not include "p.", "pp", "pgs.", "page", or "pages".

**SPECIFIC LOCATION:** The specific location on the page, display or screen, such as "first paragraph", "right column", "animation top-left", or "diagram at bottom right".

**IS THE STUDENT EXPECTATION ADDRESSED? YES OR NO:** Choose either "Yes" or "No" the TEKS is or is not addressed

## **INSTRUCTIONS**

**Laptop specifications: Windows 2000 minimum; Microsoft Excel 97 or higher; USB port.**

### **FOR EACH PANEL**

- (1) After orientation, a staff member will install, via the USB port, the required files. When the "no's" report is needed, the files must be copied to a USB drive, taken to one of the meeting computers, and the report printed. If needed, USB drives may be checked out to panel members and returned after printing the report.
- (2) When the final electronic files are to be turned in, the files must be copied to a USB drive and then the USB drive given to the assigned staff member to save to a TEA computer.
- (3) Installation of materials must be completed after orientation by staff member.

### **FOR EACH PROGRAM**

- (1) Go through the instructional materials using the publisher correlations as a guide. Review the student workbook, CD-ROM or other official bid materials and software if any are provided. Note on the evaluation instrument where the TEKS is addressed or if it is not addressed.
- (2) Once you have completed your review, confirm the "Total # of Blanks" is zero and inform IMET staff that you have completed your review. Accordingly to the Overall Recommendation take one of the next steps.

**CONFORMING:** Turn in 1 print copy of the evaluation and the errors and corrections template, your signatures on all copies and the electronic folder with your names printed



legibly on it. Note: The electronic folder should contain ONLY the FINAL versions of both the evaluation and identification of errors files for each instructional program reviewed. Remove ALL other files, scratch notes, or copies from the electronic folder.

**NONCONFORMING OR REJECTED:** Inform IMET staff that TEKS remain unaddressed and proceed to one of the conference room computers to print a “No’s report. Instructions are available on the computer to print this report. Return the report to the designated staff member. If requested, be prepared to attend a meeting with the publisher.

- (3) When you are ready to turn in your report for a program, you may enter in the “OVERALL COMMENTS” section located on the last row of the evaluation instrument a comment regarding the program you reviewed as a whole.

**FOR EACH TEKS/STUDENT EXPECTATION/BREAKOUT**

If TEKS are addressed in multiple components, then document each component individually on the Component ISBN/ID, Page and Specific Location columns by simultaneously holding down the “ALT” key and pressing ENTER. Separate each reference within a component using a comma. References are “associated” across a row. (See diagram below.) In the following example, the instructional material correlates to the TEKS in the 0123456789 component on pages 123-134, 145 and 563 and in the 9876543210 component on pages 5-37, 147 and 570.

COMPONENT ISBN/ID	Page(s)	Specific location on page/display/screen (paragraph, column, animation, etc.)
0123456789	123-134,145,563	The Sum of All Integers, first paragraph, activity
9876543210	5-37,147,570	Division Divisor, first column, animation top right

- (1) COMPONENT ISBN/ID: Enter the International Standard Book Number or the identifying number of the component from the Instructional Materials Bid for Adoption report.
- (2) PAGE(S): Type the page number or for software, web-base or video media enter the name of the component. Additionally, for video if available enter the time-stamp.
- (3) SPECIFIC LOCATION on page/display/screen (paragraph, column, animation, etc.): Enter the location on the page, monitor or screen. Examples, “animation top right”, “first paragraph”, “left column”.

**NOTE:** For software or web-based products, enter the “activity” or “section and location on the page or screen”. In the case of animated electronic or video media, enter the location in time, i.e. beginning, middle or end, or if available, the time code.

- (4) IS THE STUDENT EXPECTATION ADDRESSED? YES OR NO: Select this column and choose either “Yes” or “No”. Consult the publishers’ correlations as needed.
- (5) COMMENT(S) RELATED TO THE SPECIFIC STUDENT EXPECTATION: enter any additional information that would help to clarify your responses from the previous columns.

## SAMPLE

**Figure 2. Sample Evaluation Instrument**

Evaluations of Texas Essential Knowledge and Skills (TEKS)		Panelists Names:			G. Washington, P. Bunyan, S. B. Anthony		
<b>Curriculum Unit</b>	Chapter 111. Mathematics				Total # of Blanks:	1	
<b>Subject Area</b>	Subchapter B. Middle School				Total # Brks not addressed	2	
<b>Course</b>	§111.22. Mathematics, Grade 6.				Total # of Stud. Expectations	10	
<b>Publisher</b>	Acme Publishing, Inc.				Total # of Stud. Exp. not addressed	0	
<b>Program Title</b>	Acme Algebra 1.01				% of Student Exp. Addressed	<b>Please, fill in all blanks.</b>	
<b>ISBN</b>	0123456789				Overall Recommendation:	<b>Please, fill in all blanks.</b>	
<b>TEKS (Knowledge and Skills)</b>	<b>Student Expectation</b>	<b>Breakout</b>	<b>Component ISBN/ID</b>	<b>Page(s)</b>	<b>Location of student expectation/TEKS.</b>	<b>Is the TEKS addressed? Yes or No.</b>	<b>Comment(s) related to the specific expectation.</b>
01. Number, operation, and quantitative reasoning. The student represents and uses rational numbers in a variety of equivalent forms. The student is expected to:	A. compare and order non-negative rational numbers;	01. compare non-negative rational numbers				No	It is only mentioned in the footer on page 234.
01. Number, operation, and quantitative reasoning. The student represents and uses rational numbers in a variety of equivalent forms. The student is expected to:	A. compare and order non-negative rational numbers;	02. order non-negative rational numbers					
01. Number, operation, and quantitative reasoning. The student represents and uses rational numbers in a variety of equivalent forms. The student is expected to:	B. generate equivalent forms of rational numbers including whole numbers, fractions, and decimals;	01. generate equivalent forms of rational numbers including whole numbers	0123456789 0987654321	12,23,34 67,78,89	top left column, 1st para,3 paragraph left column, diagram, 5 paragraph on left side	Yes	Very good coverage here!
01. Number, operation, and quantitative reasoning. The student represents and uses rational numbers in a variety of equivalent forms. The student is expected to:	A. compare and order non-negative rational numbers;	01. compare non-negative rational numbers				No	It is not sufficient to only give a definition.
01. Number, operation, and quantitative reasoning. The student represents and uses rational numbers in a variety of equivalent forms. The student is expected to:	A. compare and order non-negative rational numbers;	02. order non-negative rational numbers	0123456789 0987654321	12,23,34 67,78,89	top left column, 1st para,3 paragraph left column, diagram, 5 paragraph on left side	Yes	Excellent.

## B. FACTUAL ERRORS & CHANGES

### General Information

The State Review Panel will also submit a list of errors discovered during their review according to the following TAC Codes.

TAC §66.36(a)(3) *submit to the commissioner of education a list of any factual errors in instructional materials assigned to be evaluated by the state review panel;*

TAC §66.10(c)(1) *A factual error shall be defined as a verified error of fact or any error that would interfere with student learning. The context, including the intended student audience and grade level appropriateness, shall be considered.*

TAC §66.54(g) *A publisher shall provide a list of all corrections necessary to each student and teacher component of an instructional materials submission. The list must be in a format designated by the commissioner of education and filed on or before the deadline specified in the schedule for the adoption process. If no corrections are necessary, the publisher shall file a letter stating this on or before the deadline in the schedule for submitting the list of corrections. On or before the deadline for submitting lists of corrections, publishers shall submit certification that all instructional materials have been edited for accuracy, content, and compliance with requirements of the proclamation.*

In addition to evaluating instructional materials to determine whether TEKS are addressed, panel members are to submit a list of any factual errors identified. Panel members should keep in mind the SBOE definition of factual errors (above TAC §66.10(c)(1)). Your focus on this task is crucial to ensuring that these instructional materials are free of factual errors. The major objective of the error identification process is to identify factual errors - not grammatical, editorial, or stylistic changes.

### REQUIRED CORRECTIONS PROCESS

Publishers will submit their lists of corrections and are likely to include grammatical and factual errors they identify during their final proofing. Your list will be compared with the publishers' lists to avoid any duplication on the final report of errors that the commissioner recommends for correction to the SBOE.

### Definitions and Features

See the Review for Texas Essential Knowledge and Skills (TEKS), Definitions and Features Section, page 3-4.

### Instructions

When you are reading through each component of the instructional materials, record the details of any factual errors you discover in the FORM B - Identification of Errors and Corrections by State Review Panel (SRP) template. Use the following step-by-step process to record those errors.

#### FOR EACH PROGRAM

- (1) While going through the instructional materials, note on the Error and Corrections template where the error occurs and what the error is.
- (2) ITEM TYPE: Click in this column and select a component from the list, e.g. student edition.

- (3) **COMPONENT ISBN/ID:** Enter the International Standard Book Number or the identifying number of the component from the Instructional Materials Bid for Adoption report.
- (4) **PAGE(S):** Type the page number or for software, web-base or video media enter the name of the component where the error is located. Additionally, for video if available enter the time-stamp.
- (5) **SPECIFIC LOCATION on page/display/screen (paragraph, column, animation, etc.):** Enter the location on the page, monitor or screen. Examples, “animation top right”, “first paragraph”, “left column”.

NOTE: For software or web-based products, enter the “activity” or “section and location on the page or screen”. In the case of animated electronic or video media, enter the location in time, i.e. beginning, middle or end, or if available, the time code.

- (6) **TYPE OF CORRECTION:** Use the drop down box to click a type of error: actual Error, Editorial Correction, or Editorial Change. Use the following guidelines to make your selection:

Factual error: A verified error of fact or any error that would interfere with student learning. Example:  $E=mc^3$ .

Note: You may also select editorial correction if the error is not an error of fact or an error that would not interfere with student learning, ex. word misspelled, punctuation, a picture with a caption that doesn't match. Or you may select editorial change, if you wish to suggest a non-essential enhancement or change to the design, color, style of print, etc., that does not correct an error, ex. change font, change a picture, or change a chart to a diagram.

- (7) **DESCRIPTION OF ERROR:** In this column, add clarifying comment(s). Give appropriate detail regarding the recommended error or change. Be specific and concise and begin each statement about the error with a verb (e.g., Change, Omit, Delete, Include, Add, etc.). If applicable, note any source you used to verify the factual error or your recommendation (e.g., Encyclopedia Britannica, vol. x, pages x-x; World Book Encyclopedia, vol. x, pages x-x; Physicians’ Desk Reference, page x; etc.).
- (8) On turning in a team’s final report for a program, reviewers will sign a printed version of the form and return the form to IMET staff along with the TEKS evaluation. Note: If no errors were found, enter “No errors found” in the first comments cell and turn in as above.

**SAMPLE**

**Figure 3. Identification of Errors & Changes Template**

<b>Identification of Errors and Changes by State Review Panel (IDECSRP)</b>					
<b>Chapter</b>	111. Mathematics				
<b>Subchapter</b>	Math Subchapter D. Other High School Mathematics Courses				
<b>Course</b>	§111.22.Mathematics, Grade 6.				
<b>Publisher</b>	Acme Publishing, Inc.				
<b>Program Title</b>	Acme Algebra 1.01				
<b>ISBN</b>	0123456789				
<b>Correction Totals</b>	<b>Factual Errors=4</b>		<b>Editorial Changes=1</b>		<b>GRAND TOTAL=5</b>
<b>Item Type</b>	<b>Component ISBN/ID</b>	<b>Page Number</b>	<b>Spec location on page/display/screen</b>	<b>Type of correction</b>	<b>Description of Error</b>
student edition	0123456781	12	top left diagram	Factual Error	Line should curve up not down.
teacher edition	0123456782	12	top left diagram	Factual Error	Line should curve up not down.
teacher resource	0123456783	345	#23 blackline	Editorial Change	Hard to understand in black and white needs color.
teacher/student material	123456784	Acme WWW 1.01 Testing Numbers	Animation bottom right	Factual Error	The bar graphs do not grow at appropriate rates.
student edition	0123456789	123	fifth paragraph	Factual Error	"Catt" should be "Cat".

## Section 4: TRAVEL INFORMATION

### REIMBURSEMENTS

*TAC §66.39(a) State review panel members shall be reimbursed for expenses incurred in attending official meetings according to the applicable provisions of the General Appropriations Act.*

State review panel members will receive reimbursement for expenses incurred during their travel. Only expenses of panel members may be reimbursed. Travel expenses for spouses, family members, or other persons traveling with panel members are not reimbursable. Note that several statutes prohibit the Texas Comptroller of Public Accounts from making payments to entities or individuals who are indebted to the state. An agency that reports such debts to the Comptroller may place payees on hold, and the Comptroller will release “warrants on hold” only upon instruction from the agency that placed the hold.

A payee ID number must be setup for every person (sole owner, individual recipient, corporation or other organization) who intends to bill TEA for goods and/or services unless a contractor has previously contracted with or received payment from a Texas state agency and the number has been assigned. Your Payee ID number is your SSN (Social Security Number) preceded by a “2” and followed by several other accounting code numbers and letters. TEA will request your Social Security Number and verify contact information prior to the meetings.

Panel members are asked to submit travel reimbursement forms electronically along with any receipts prior to departure. Any additional final travel expense receipts or additional information should be submitted within 14 days. A check/warrant will be mailed or deposited directly into your bank account electronically. If you prefer to have your reimbursement mailed to you it will take approximately 30 days after the meetings are concluded provided your information has been correctly submitted. To expedite the processing of your reimbursement we request that you set up a direct deposit by filling out the *Texas Application for Payee Identification Number* and the *Vendor Direct Deposit Authorization* forms which were sent to you in your initial mailing. If you would like to take advantage of getting your reimbursement faster, please return the completed applications to the Texas Education Agency’s accounting department at the below address. It will take approximately 14 days to set up the direct deposit authorizations so it is important to **send the forms back to the accounting department no later than June 1, 2006.**

Texas Education Agency  
Division of Accounting Operations  
1701 North Congress Avenue  
Austin, Texas 78701

The review of the instructional materials will occur in the contracted hotel. Rooms have been secured at a special single room rate for Panel Review Members at **The Crowne Plaza Hotel** (formerly the Red Lion) Austin, Texas which is located at **6121 I-35 @ Hwy 290 East, Austin, Texas 78752**, just 3 miles from downtown Austin. Requests for double rooms will be accepted but panel members will be responsible for the additional \$20.00 per day cost. Contact us immediately if a double room is required. If you have questions, please contact: Tiffanay Waller at 512-463-1594.

## **GUIDELINES FOR CLAIMING PER DIEM TRAVEL EXPENSES**

### **I. ALLOWABLE TRAVEL EXPENSES:**

- A. Personal automobile mileage from headquarters (home or office) to place of official business, reimbursed at .445¢ per mile. Mileage cannot exceed the mileage allowed in the Texas Comptroller of Public Accounts Texas Mileage Guide (see <http://www.cpa.state.tx.us/comptrol/texastra.html>).
- B. Any personal automobile mileage incurred for official business. This mileage may be within headquarters, to or from airport, or from a place of business or residence as long as the shortest possible route is claimed and is for official business.
- C. Airfare at the lowest fare available. (Airfare must be documented with receipt.) If first class, a statement that only first class airfare was available must be attached to the required airfare receipt.
- D. Rental of a car is not allowed unless other transportation such as taxi or shuttle is not available for performing duties associated with the panel reviews and unless it is documented that it is more cost effective to rent a car than it is to take alternate travel. (Rental car expense must be documented with receipt; also attach justification that rental car was more cost effective.)
- E. Airport parking. Document with receipt if possible.
- F. Parking and toll road expenses while on official business. These may not be claimed while on personal business, such as obtaining a meal. Document with receipt if possible.
- G. Lodging and meals are reimbursed at actual cost not to exceed \$85.00/day for lodging and \$36.00/day for meals. The per diem rates are not an "allowance." For example, if, in the conduct of the contract, duties begin at 6:00 a.m. and end at 10:00 p.m. on the same day, the \$36.00 for meals may not be claimed unless that amount is actually spent. The actual amount to be claimed up to \$36.00. Lodging must be documented with receipt that reflects a zero balance and contains the address of the hotel. The hotel single room rate will be direct billed to the agency. Incidental expenses must be paid directly by panel members. Only business related incidentals will be reimbursed. Panel members are responsible for providing a zero balance on the hotel receipt prior to departure.
- H. Reimbursement may not exceed \$25 per day when no overnight stay is involved. The traveler must be outside of their designated headquarters for six consecutive hours on the day the expenses are incurred. A traveler passing through their designated headquarters while traveling from one duty point to another, both of which are outside the traveler's designated headquarters, does not suspend the consecutive hour string of being outside the headquarters.
- I. Taxi fares for official business. Tips cannot be reimbursed.
- J. Itemized miscellaneous expense, i.e. business phone calls, printing, materials supplied by contractor and used while carrying out services described in the contract.

### **II. UNALLOWABLE TRAVEL EXPENSES:**

- A. First class airfare.
- B. Tips of any kind.
- C. Alcoholic beverages.
- D. Entertainment/recreation.
- E. Meals or any other expenses for other persons.
- F. Meals that are unreasonable in cost.

- G. Unreasonable accommodations such as a penthouse, unnecessary suite, or expensive hotel room.
- H. Mileage, parking and toll road expenses for purposes other than for official business.
- I. Personal Accident Insurance or Personal Effects coverage for rental cars.
- J. Rental car for personal use or for purposes not associated with the performance of services specified in the contract.
- K. Any expenses, with the exception of parking and toll expenses, related to the operation of an automobile.

Contact Tiffanay Waller at [tiffanay.waller@tea.state.tx.us](mailto:tiffanay.waller@tea.state.tx.us) with any questions concerning travel reimbursement.

## RECEIPT INFORMATION

**Airfare** – Airfare must be at the lowest fare available. Request coach or economy seating when making your reservations. No-shows and non-refundable tickets will not be reimbursed. A copy of your itinerary is acceptable as a receipt, provided it shows travel dates, times, airline, and fare. Forward the itinerary from your travel agent via email to Tiffanay Waller at [tiffanay.waller@tea.state.tx.us](mailto:tiffanay.waller@tea.state.tx.us). Please type “**your name**” and “**travel itinerary**” in the subject line of the email. If you make travel changes, submit an updated itinerary.

**Hotel Lodging** – Single room lodging will be direct billed to TEA. Incidental expenses must be paid for by the panel members. Only business related incidentals will be reimbursed. Panel members are responsible for providing a zero balance receipt prior to leaving. The receipt must have the hotel’s address on it.

**Hotel Parking** –Use self-serve parking and document with receipt if possible. Valet parking charges will not be reimbursed.

**Hotel Incidental Business Expenses** – Incidental expenses related to business, such as business telephone calls, will be reimbursed.

**Airport Parking, Shuttle, Taxi, Etc.** – Airport parking, shuttle, and taxi receipts are preferred, but you can annotate the amount and a breakdown of the charges on paper.

**Meal Reimbursements – Daily maximum allowance is \$36.** We suggest you turn in your meal receipts, especially if you spend more than \$36 per day. Having receipts could prevent a delay in processing your reimbursement should questions arise. Reimbursements are for panel members only. If your receipt is for more than one person, just circle your amount and include it on the worksheet. Amounts cannot be carried over from one day to the next. Tips and alcoholic beverages are not reimbursable. The commissioner of education may adjust this reimbursement rate and you will be informed accordingly.

**NOTE:** Submit your receipts in the envelope provided. Do not staple receipts to your forms.

## TRAVEL TEMPLATES



Panel members will submit travel reimbursement forms electronically. An electronic folder containing a Microsoft Excel Workbook of travel templates will be installed onto your computer at the end of the orientation and training session. The following templates are included in the Excel Workbook for your use: *Travel Reimbursement Worksheet* and *Travel Voucher Form*. Please make a copy of the workbook before beginning, then rename it with your last name (up to eight characters) and first initial of your first name (example: “washingtg”). Consistency in naming the files with last name and first name initial will help us in locating your file to make any final additions or corrections.

## **TRAVEL REIMBURSEMENT WORKSHEET**

Record your daily expenses on the *Travel Reimbursement Worksheet* (see figure 4). Please complete this template first as this will make it easier to transfer the total daily expenses to the *Travel Voucher* form. The completed Travel Reimbursement Worksheet should be turned in to Tiffanay Waller along with the Travel Voucher Form at the time of check out.

The travel worksheet template contains pre-filled fields customized to your review week. The amount of \$0.00 has been pre-filled to indicate areas you will change to an actual amount. The field can be deleted when not applicable. If you prefer to work on a print copy of the travel templates, please let a TEA staff member know and we will have it printed for you. The form can be customized with your name, address, social security number, etc. Use pencil to allow for erasing as needed. We recommend that you update your expense information daily whether using a print or electronic form. This will expedite the checkout process for everyone on the last day.

**As always, periodically save the file as you work with it.**

Figure 4. Travel Reimbursement Worksheet

PROCLAMATION 2004 STATE REVIEW PANEL					
TRAVEL REIMBURSEMENT WORKSHEET					
Committee Member Name: (Please print)		(Delete This and Enter Your Name Here)			
Social Security Number:		(Delete This and Enter Your SSN Here)			
ACTUAL MEALS & TOTALS PER DAY					
SUNDAY		MONDAY		TUESDAY	
Date	6/18/2006	Date	6/19/2006	Date	6/20/2006
Breakfast	0.00	Breakfast	0.00	Breakfast	0.00
Lunch	0.00	Lunch	0.00	Lunch	0.00
Dinner	0.00	Dinner	0.00	Dinner	0.00
Other		Other		Other	
Actual Total	0.00	Actual Total	0.00	Actual Total	0.00
<b>Amount Forwarded for Reimbursement</b>		<b>Amount Forwarded for Reimbursement</b>		<b>Amount Forwarded for Reimbursement</b>	
\$ -		\$ -		\$ -	
<i>(Maximum Per Day \$36.00)</i>		<i>(Maximum Per Day \$36.00)</i>		<i>(Maximum Per Day \$36.00)</i>	
WEDNESDAY		THURSDAY		FRIDAY	
Date	6/21/2006	Date	6/22/2006	Date	6/23/2006
Breakfast	0.00	Breakfast	0.00	Breakfast	0.00
Lunch	0.00	Lunch	0.00	Lunch	0.00
Dinner	0.00	Dinner	0.00	Dinner	0.00
Other		Other		Other	
Actual Total	0.00	Actual Total	0.00	Actual Total	0.00
<b>Amount Forwarded for Reimbursement</b>		<b>Amount Forwarded for Reimbursement</b>		<b>Amount Forwarded for Reimbursement</b>	
\$ -		\$ -		\$ -	
<i>(Maximum Per Day \$36.00)</i>		<i>(Maximum Per Day \$36.00)</i>		<i>(Maximum Per Day \$36.00)</i>	

\_\_\_\_\_  
Traveler's Signature

**STEPS TO COMPLETING THE TRAVEL REIMBURSEMENT WORKSHEET:**

1. Enter your name and Social Security Number.
2. **ACTUAL MEALS & TOTALS PER DAY** - Record your daily actual meal expenditures. If the maximum amount per day exceeds \$36, the amount forwarded for reimbursement to the *Travel Voucher Form* will be \$36. This amount is not a per diem; it is the actual cost of meals up to the maximum of \$36 per day. Amounts cannot be carried over from one day to the next.
3. **TOTAL** – The daily total will be automatically updated for you to transfer the total amounts to the Travel Voucher. Verify this amount and be sure you have included everything. All receipts should accurately reflect the total amounts entered on the worksheet and the voucher. This total should be expected on your reimbursement check.

## TRAVEL VOUCHER FORM

The *Travel Voucher Form* (see figure 5) should correspond with information on the *Travel Reimbursement Worksheet*, and receipts. Information cannot be manually entered in the “gray” areas of the form. The amounts for these fields are automatically calculated.

**Figure 5. Travel Voucher Form**

**TRAVEL VOUCHER**

Entered: \_\_\_\_\_  
Approved: \_\_\_\_\_

Agency Number <b>701</b>	Agency Name <b>Texas Education Agency</b>	Current Document Number
-----------------------------	----------------------------------------------	-------------------------

**Payee Information:**

Pay To <b>Traveling Bob</b>	<b>Travel Advance:</b> <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	<b>Check Appropriate:</b> <input type="checkbox"/> Employer <input type="checkbox"/> Commission <input checked="" type="checkbox"/> Board Membe
Title <b>State Review Panelist</b>		
Taxpayer ID <b>21584962593</b>		

**Travel Information:**

Travel Dates From **6/18/06** To **6/23/06** Designated Headquarters **Houston**

**Contact Person**

Name: **Tiffany Waller** Telephone **512463-1594**

Org ID	Object	Expense	Amount Claimed
211328	7101	Travel In-State--Public Transportation Fare	\$480.00
211328	7102	Travel In-State--Mileage, taxi \$30, airfare \$ 450	\$133.50
	7104	Travel In-State--Actual Expenses (meal and lodging)	
211328	7105	Travel In-State--Incidental Expenses toll \$2, airport parking \$5	\$7.00
	7106	Travel In-State--Meal/Lodging	
211328	7110	Travel In-State--Meal/Lodging (Board Members)	\$163.00
517003	7135	Travel In-State--STATE PORTION of the Hotel Occupancy Tax (Excluding Galveston)	
	7136	Travel In-State--STATE PORTION of the Hotel Occupancy Tax (Galveston ONLY)	
517003	7137	Travel In-State--STATE PORTION of the Hotel Occupancy Tax (South Padre Island ONLY)	
	7111	Travel Out-of-State--Public Transportation Fare	
	7112	Travel Out-of-State--Mileage, miler @ .445	
	7114	Travel Out-of-State--Actual Expenses (meal and lodging)	
	7115	Travel Out-of-State--Incidental Expenses	
	7116	Travel Out-of-State--Meal/Lodging-NTE Locality Allowance	
	7130	Travel Out-of-State--Meal/Lodging (Board Members)	
	7121	Foreign Travel--Actual Expenses (airfare, meals, lodging, etc.)	
	7470	Rental of Space	
<b>TOTAL</b>			<b>\$783.50</b>



Figure 5. Travel Voucher Form – continued

**Scheduled Working Hours:** 8:00 am to 5:00 pm and 7:00 p.m. - 9:00 p.m.

**Purpose of the Trip and Benefit to the State:** Attend Proclamation 2004 State Review Panel Meeting held by Texas Education Agency (TEA), during June in Austin, Texas. Meeting included orientation, training, and reviewing instructional materials.

Date	Record of Transportation and Duties Performed	Mileage Between Points	
		In State	Out of State
6/18/06	Departed residence and drove personal vehicle from Houston to the Crown Plaza Austin Hotel. Drove personal vehicle 150 miles to secure overnight lodging paid by TEA and direct billed. Staged overnight.	150.0	
6/19/06	Conducted business. Overnight Lodging.		
6/20/06	Conducted business. Overnight Lodging.		
6/21/06	Conducted business. Overnight Lodging.		
6/22/06	Conducted business. Overnight Lodging.		
6/23/06	Conducted business. Departed the Crown Plaza Austin Hotel and drove personal vehicle to headquarters in Houston, 150 Miles.	150.0	
	Replaced this line with texts of any other necessary information of incidental expenses. Include amounts and fill in date column. Additional supporting information.		
	**Extra miles is for distance from residence/headquarters to center of town and for return trip.		
<b>Total Mileage</b>		<b>300.0</b>	

**Justification for Multiple Employee Travel:**

Headquarter Location: Houston TX  
 Departure Location: Austin TX  
 Destination: The Crown Plaza Hotel  
 Return Location: Houston TX  
 No. of staff traveling: 1

**Multiple staff was required to:**

Visit a school district (name of school district)  
 Visit an Education Service Center (name of ESC)  
 Attend a conference/seminar/training (city, state)

**STEPS TO COMPLETING THE TRAVEL VOUCHER FORM:**

- 1) **PAY TO** - Enter Your Full Name. This is how your name will appear on your reimbursement check.
- 2) **TITLE** - State Review Panel Member
- 3) **TAXPAYER ID** - This is the traveler’s social security number preceded by a 2.
- 4) **TRAVEL ADVANCE** - check the box “NO.”
- 5) **CHECK APPROPRIATE** - check the box “Board Member.”
- 6) **TRAVEL DATES FROM/TO** - Beginning and ending dates of travel. Date you left home and date you will leave Austin to return. Most likely, you will use Friday’s date for your departing date even if you extended your stay for personal reasons.

- 7) **DESIGNATED HEADQUARTERS** - Your hometown, residence, the city or town where you live and from which you traveled.
- 8) **CONTACT PERSON NAME & TELEPHONE** - Tiffanay Waller, Instructional Materials and Educational Technology, Room 3-110, 512-463-1594.
- 9) **ORGID** - 211-328
- 10) **TRAVEL IN-STATE – PUBLIC TRANSPORTATION FARES - In object line 7101 –** Enter in the total amount of all Public Transportation fares in the amount claimed column. This includes airfare, taxi, shuttle and bus expenses.

**Airfare** – List airfare amount and attach receipt or itinerary. The requirements for airfare receipts are as follows: Traveler’s name, dates of travel, destinations of travel, fare codes (YCATX or QCATX), ticket number, name of airline, class of transportation and the amount of the airfare.

**Taxi, shuttle, or other similar** – List type of transportation and amount. An explanation or narrative is required to claim these expenses. The narrative can be done on the second page of the Travel Voucher in the section labeled *Record of Transportation and Duties Performed*. Place the narrative at the bottom of this section because this area is mainly for recording mileage. Do not put anything in the second column labeled “*Mileage Between Points*”.

- 11) **TRAVEL IN-STATE – MILEAGE (# OF MILES X .445¢)** - Place all explanations on the second page of the Travel Voucher Form in the section labeled *Record of Transportation and Duties Performed*. Enter dates, destination, and mileage. Here are some examples: Drove personal vehicle to and from the airport XX miles round trip, parked at the airport. Departed residence in Houston and reported to State Panel Review Meeting in Austin. Departed State Panel Review Meeting in Austin to return to residence in Houston. Distance from/to residence/airport via 3<sup>rd</sup> party for a round trip is XX miles times two trips. Mileage via 3<sup>rd</sup> party is cheaper than airport parking. Parking fee at the airport is 1-day, \$0.00 times X days = \$0.00. Mileage of XX miles times \$.445 = \$0.00. If you place anything in the “*Mileage Between Points*” it will automatically update the actual miles claimed in object line 7102 on the first page of the travel voucher. This number should be the same number of miles claimed on the narrative of the second page of the Travel Voucher. The mileage amount will automatically calculate and fill in the gray area at the end of the row in the amounts claimed column. Be sure to include round trip mileage if applicable. If you drive one way, and use an additional mode of travel, indicate the mileage from or to Austin as appropriate. Submit one copy of the Texas Mileage Guide printout showing mileage and reimbursement calculations with your travel forms.

The Texas Mileage Guide, provided by the Texas Comptroller of Public Accounts, shows the mileage between locations/cities and calculates the reimbursement based on a per-mile rate. To obtain your mileage reimbursement information, go online to <http://www.cpa.state.tx.us/comptrol/texastra.html>. This information can also be obtained at the meeting.

Mileage is calculated from the center of each city or town. Additional miles can be claimed if the actual distance from your house to Austin begins outside the center of your city or town. To claim these additional miles, provide a narrative comment on the *Travel Voucher Form*. Use a sample narrative from the travel templates in your electronic folder. If you live in a small town that does

not exist on this website, add the distance from your residence to a nearby town listed on the website.

To calculate your mileage on the Texas Mileage Guide, enter your city in the first field “From:”, then enter “To: Austin”, and next enter “To:” back to your residence. Please see Figure 6. The final mileage reimbursement and calculation as shown in Figure 7.

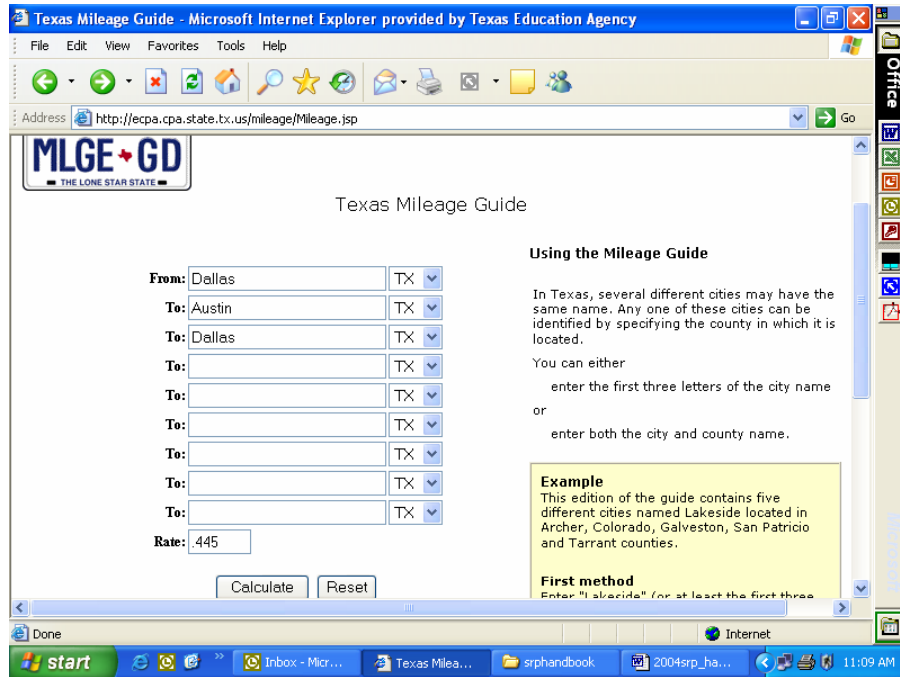
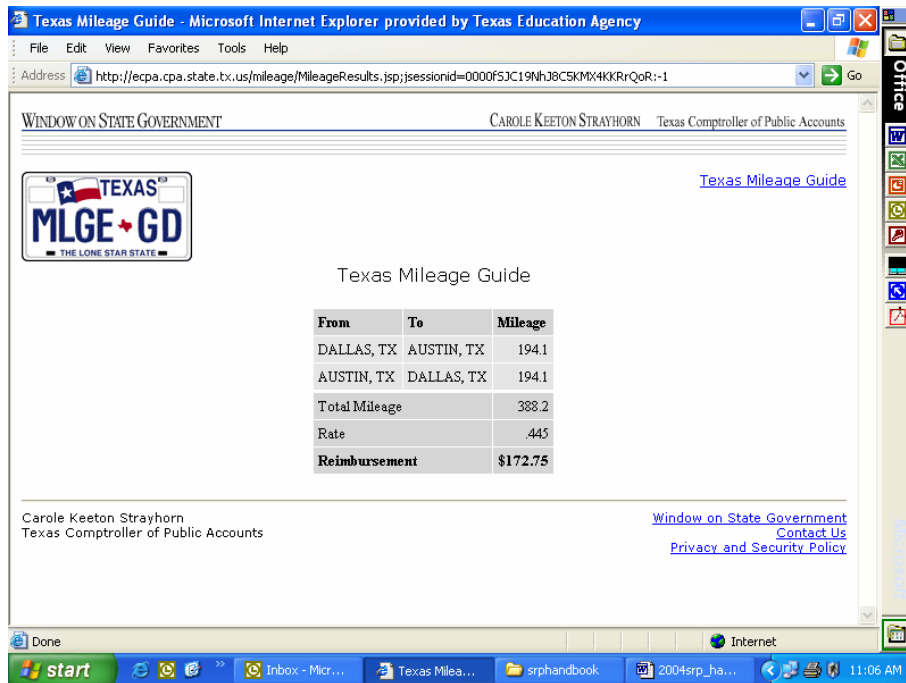


Figure 6. Calculating Mileage



**Figure 7. Final Mileage and Reimbursement Calculation.**

- 12) **TRAVEL IN-STATE - INCIDENTAL EXPENSES** - Enter the amount of all allowable incidental expenses in the amount claimed column in object line 7105. In the yellow section to the right of the amounts claimed row, please try to itemize each expense. Common types of allowable incidental expenses are: airport parking, tolls, and business related phone calls. Examples of justifications for business calls can be better explained on the second page of the Travel Voucher Form in the bottom section of the *Record of Transportation and Duties Performed*. Example: 6-20-06 “Called school district, computer department, to get a password for the laptop computer I have signed out to use at the meeting in Austin. Amount of call shown on hotel bill is \$2.25”.

**Telephone calls** must be business related to be reimbursed. Explain the date the call was made, where or to whom the call was made, the purpose of the call, and the charge for the call. You can obtain a receipt for these calls by asking the hotel for a copy of your bill.

- 13) **TRAVEL IN-STATE – MEALS/LODGING (BOARD MEMBERS)** - On the second page of the travel voucher “*In-State Leave Headquarters/Arrive Headquarters*” you will need to record the time you left home and record the time that you will be arriving back home. The totals for each meal that you recorded daily from the *Travel Reimbursement Worksheet* will assist you in completing your travel voucher. The worksheet will provide you with a daily total amount that will need to be transferred to the travel voucher for “*Actual Expenses Schedule - Meals*” on the second page of the travel voucher. This will be automatically updated to the first page of the Travel Voucher on object line 7110. (7104 and 7106 remains blank) Verify this amount and be sure you have included everything. All receipts should accurately reflect the total amounts entered on the worksheet and the travel voucher. This total should be expected on your reimbursement check.



**LODGING – Do not add the expense of hotel costs to this voucher.** Hotel arrangements will be made for you by TEA and the charges will be direct billed to the agency.

**Scheduled Working Hours:** 8 am – 5 pm and 7 pm – 9 pm

**Purpose of the Trip:** Attend Proclamation 2004 State Review Panel Meeting held by Texas Education Agency (TEA), during June in Austin, Texas. Meetings included orientation, training, and reviewing instructional materials for adoption included in Proclamation 2004.

**Date:** Be sure to enter a date and an explanation for each day you attend. Explanations are more detailed on arriving and departing days. This is where you will list what you did in the order in which it was done and include miles and fees when applicable. Days during the week are easier; just enter: Conducted business. Overnight lodging. The departing day may start with “Conducted business” and then explain departure information. If days and information are omitted, these days will also be omitted from your reimbursements.

**Record of Transportation and Duties Performed:** In this section you will provide details for each day – “What you did, when, where, and why”. Include dates, narratives, mileage, and notes for clarification. The fields on the form do **not** expand; therefore, only the amount of information that “fits” on a line can be entered.

**Mileage Between Points:** The actual miles that correspond to your Record of Transportation and Duties Performed narrative are listed in the Mileage Between Points, In State column. The total miles from this column transfers to page one and is automatically calculated for you there.

**Justification for Multiple Employee Travel:** Even if you are attending alone you need to fill in this section.

**Multiple staff was required to:** Attend as a Member of the State Panel Review to review evaluate the instructional materials submitted for Proclamation 2004 under the November 2006 adoption by the State Board of Education.

**SIGNATURE** – The final copy of your *Travel Voucher Form* will be printed and **must** be signed **BLUE INK.**

**NOTE:** Turn in this form at checkout. Do not mail to Division of Accounting.

## RETURNING FORMS AND CHECKOUT

You may check-out with TEA and are dismissed once the following items have been turned in:

1. Evaluation Instruments - save to the USB drive and print copies for each title you reviewed. Print copies should be signed by all members of your panel.
2. Identification of Errors and Correction Forms - save to the USB drive and print copies for each title you reviewed. Print copies should be signed by all members of your panel.
3. Publisher Correlations and/or anything else borrowed from the TEA headquarters.
4. Survey Form.
5. Travel reimbursement documents on the USB drive.
  - a) Update your travel electronic folder and submit the following to Tiffanay Waller in the TEA headquarters.
  - b) *Travel Voucher Form*— Tiffanay will print a copy for you to sign in **BLUE INK**. Your signature **CANNOT** be in black ink. If you plan to submit additional entries after the meeting, print and sign an “up-to-date” copy.
  - c) *Travel Reimbursement Worksheet* – print a copy from the electronic folder on the USB drive. Sign the form.

- d) Airline travel itinerary.
- e) Texas Mileage Guide printout, 1 copy.
- f) Receipts for meals and any other business related expenses in envelope provided.

Return all travel reimbursement forms, receipts, and changes in personal information to Tiffanay Waller. Panel members should submit travel reimbursement forms and receipts by the close of their panel meeting. If you have any final travel expense receipts or additional information to submit, it must be submitted within **14** days of the conclusion of your meeting. Use a Texas Education Agency Return Envelope or use a blank envelope, mail it to the address below and add the attention line to the lower left hand corner.

Attention: Tiffanay Waller

Texas Education Agency  
Division of Instructional Materials and Educational Technology  
Rm 3-110  
1701 North Congress Avenue  
Austin, Texas 78701-1494

If you need additional information or if you have questions regarding travel reimbursement, contact Tiffanay Waller at [tiffanay.waller@tea.state.tx.us](mailto:tiffanay.waller@tea.state.tx.us).



## Section 5: APPENDICES

### **Appendix A: Proclamation 2004 of the State Board of Education**

The current proclamation of the State Board of Education is the official document calling for bids from publishers. Website: <http://www.tea.state.tx.us/textbooks/proclamations/proc2004/proc2004.pdf>

### **Appendix B: Chapter 31, Texas Education Code, Textbooks**

Current education laws and other statutes pertaining to the operation of the public schools of the State of Texas are codified in the *Texas Education Code*. The entire statute can be downloaded, searched by keywords, or viewed chapter by chapter from an index page.

Website: <http://www.capitol.state.tx.us/statutes/ed.toc.htm>

### **Appendix C: Title 19, Texas Administrative Code, Chapter 66, State Adoption and Distribution of Instructional Materials**

All rules of the State Board of Education are codified in Title 19, *Texas Administrative Code*. Website:

Website: <http://www.tea.state.tx.us/rules/tac/chapter066/index.html>

### **Appendix D: The Adoption Cycle for Foundation and Enrichment Subjects**

Website: <http://www.tea.state.tx.us/textbooks/adoptprocess/index.html>

### **Appendix E: Schedule of Reviews**

Website: <http://www.tea.state.tx.us/textbooks/adoptprocess/pubhandbkp2004/p2004appendixd.pdf>

### **Appendix F: Chapter 572, Texas Government Code, Personal Financial Disclosure, Standards of Conduct, and Conflict of Interest**

Website: <http://www.capitol.state.tx.us/statutes/statutes.html>

### **Appendix G: Chapter 36, Texas Penal Code, Bribery and Corrupt Influence**

Website: <http://www.capitol.state.tx.us/statutes/pe.toc.htm>

### **Appendix H: Staff and Contact Information**

Instructional Materials and Educational Technology Website:

<http://www.tea.state.tx.us/textbooks/staff/index.html>

Division of Curriculum Website:

<http://www.tea.state.tx.us/curriculum/staffdir.html>

### **Appendix I: Current List of Instructional Materials Bid for Proclamation 2004**

Website: <http://www.tea.state.tx.us/textbooks/adoptprocess/subjectsump2004.pdf>

### **Appendix J: Education Service Center Information**

Website: <http://www.tea.state.tx.us/textbooks/adoptprocess/reviewpanel/appendixj.pdf>

### **Appendix K: Questions and Answers About Proclamation 2004**

The Questions & Answers document addresses specific questions and requests for clarification posed by publishers and interested citizens.

Website: <http://www.tea.state.tx.us/textbooks/proclamations/index.html>

### **Appendix L: Chapter 552, Texas Government Code, Public Information**

Website: <http://www.capitol.state.tx.us/statutes/statutes.html>

### **Appendix M: Chapter 551, Texas Government Code, Open Meetings**

Website: <http://www.capitol.state.tx.us/statutes/statutes.html>