**Prepare**

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| **Establish Your Process** | | |
| **Action Checklist** | **Related Resources** | **Team Notes and Decisions** |
| * If not previously established, assemble an adoption committee composed of a variety of stakeholders, including teachers and school leaders. | [Adoption Committee Recommendations](https://www.edreports.org/resources/article/adoption-committee-recommendations)  [Redefining Engagement: How Baltimore City Schools Transformed its Approach to Adopting Instructional Materials](https://www.edreports.org/resources/article/redefining-engagement-how-baltimore-city-public-schools-transformed-its-approach-to-adopting-instructional-materials)  [Materials Adoption 101: Engage Educators Upfront](https://www.edreports.org/resources/article/materials-adoption-101-engage-educators-upfront) |  |
| * Create a timeline and milestones that extend from adoption through launch. |  |  |
| * Define the parameters of your adoption (e.g., budget, timing, decision-making process, tech needs). |  |  |
| * Engage your committee in appropriate professional learning in order to prepare for your investigation of the materials (includes standards and shifts as well as “why materials matter”). |  |  |

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| **Reflection Questions** |
| Who has been involved, and at what level of commitment, through this stage? What new learning or activities have you applied to the selection process? |
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| Describe how your instructional vision and local priorities have influenced this stage. |
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| Describe how you have incorporated educator voice and expertise through this stage. What are your plans for communicating to stakeholders in preparation for the next stage? |
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| **Develop Your Lens** | | |
| **Action Checklist** | **Related Resources** | **Team Notes and Decisions** |
| * Analyze your current state: consider data (e.g., student, teacher, system), key initiatives, and adoption requirements set forth in school or state board policies (e.g., RFP procedures, procurement requirements). | [Data Collection Tool](https://www.edreports.org/resources/article/data-collection-tool) |  |
| * Establish or communicate an instructional vision for the content area of your adoption to guide the process. An instructional vision is a general description of instructional aspirations and articulates the way districts see teaching and learning for the content. | [Sample Instructional Vision Statements](https://www.edreports.org/resources/article/instructional-vision-statements) |  |
| * Codify your district priorities and additional review criteria: using the knowledge of your current state, establish additional criteria (beyond alignment to standards and instructional shifts) that align with your instructional vision and support the needs of your local community. | [Each Child, Our Future](http://education.ohio.gov/About/EachChildOurFuture)  [Materials Adoption 101: Engage Educators Upfront](https://www.edreports.org/resources/article/materials-adoption-101-engage-educators-upfront)  [3 Ways a Small District Can Harness the Power of EdReports.org](https://www.edreports.org/resources/article/dreaming-big-in-marysville-how-small-districts-can-harness-the-power-of-edreports-org)  [Building Capacity and Consensus Through a Teacher-led Materials Adoption](https://www.edreports.org/resources/article/building-capacity-and-consensus-through-a-teacher-led-materials-adoption)  [Adopting Materials for Hybrid and Remote Settings: Know Your Technology Needs Upfront](https://www.edreports.org/resources/article/adopting-materials-for-hybrid-and-remote-settings) |  |
| * Engage the committee in professional learning experiences to ensure their work is grounded in a shared understanding of why materials matter and the content-specific characteristics of instructional materials | [Using EdReports Reviews to Support an Educator-Led Adoption Process](https://www.edreports.org/resources/article/from-the-superintendent-eys-desk-using-edreports-reviews-to-support-an-educator-led-adoption-process) |  |

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**Study**

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| **Know and Winnow Your Choices** | | |
| **Action Checklist** | **Related Resources** | **Team Notes and Decisions** | |
| * Learn about the available programs in your grade and content area using EdReports.org. | [Guiding Questions for Winnowing Instructional Materials Under Consideration](https://www.edreports.org/resources/article/guiding-questions-for-winnowing) |  | |
| * Conduct initial research (online, telephone, email). * Use the EdReports compare feature and read reports to learn more about how well materials meet expectations for alignment and other characteristics of quality. * Contact other districts or experts to gather anecdotal information about programs. | [Adopting New Curriculum? Three Ways to Narrow Your Options](https://www.edreports.org/resources/article/adopting-new-curriculum-3-ways-to-narrow-your-options) |  | |
| * Apply your district lens to this research and decide which 2-4 programs you plan to study more deeply. |  |  | |
| \*Note: we recommend completing steps 1-3 (Develop Your District Lens, Establish Your Process, Know and Winnow Your Choices) before you dive into any materials or engage more deeply with publishers. |  |  | |

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**At the end of this step, you should have 2-4 quality materials selected to consider during the next steps.**

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| **Investigate the Materials** | | |
| **Action Checklist** | **Related Resources** | **Team Notes and Decisions** |
| * Establish the structure and process for this next phase of research, which focuses on deep study of each of the programs you’re considering. Start by asking yourselves: * What do we want to learn about how the materials address our priorities? * What is the best way to learn this? | [Four Ways to Investigate Instructional Materials Under Consideration](https://www.edreports.org/resources/article/4-ways-to-investigate-materials) |  |
| * Reach out to publishers to request samples of the materials and set up future presentations. Use the time with publishers to have them answer questions the committee has developed that specifically address your local priorities, as well as to discuss strengths and gaps identified in the reports. \*Note: you may end up winnowing your list to an even smaller number after speaking with the publisher representatives. | [Lessons from the Field: Best Practices for Piloting Curriculum](https://www.edreports.org/resources/article/lessons-from-the-field-best-practices-for-piloting-curriculum) |  |

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| * Determine what kind of professional learning will be needed for those engaged in investigating the materials. For example, if you are piloting to learn about the time it takes to teach a full lesson, the professional learning needed from the publisher might simply be to walk through the lesson “must-dos” and “may-dos”. |  |  |

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**Decide and Launch**

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| **Make a Decision** | | |
| **Action Checklist** | **Related Resources** | **Team Notes and Decisions** |
| * Examine the evidence collected from your investigation tied to the priorities/additional criteria you’ve established: * Compare the options - strengths and weaknesses * Analyze feedback from stakeholders * Assess what work you’ll need to engage in to implement each of your options and consider the implications on other initiatives or staff capacity |  |  |
| * Use your decision-making process to make a final selection. | [Make Your Decision: A Resource to Support Your Materials Adoptions Process](https://www.edreports.org/resources/article/making-your-decision)  [The Case for Consensus](https://www.edreports.org/resources/article/the-case-for-consensus) |  |
| * Develop communications that will share the decision and the expectations moving forward. |  |  |
| * Plan for the procurement and distribution of the materials. |  |  |

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| **Launch and Implement** | | |
| **Action Checklist** | **Related Resources** | **Team Notes and Decisions** |
| * Create an on-going professional learning plan that includes “getting to know” the materials as well as sustained professional learning that directly focuses on how teachers will learn to teach using the new materials. | [Launch and Implementation Planning for Your Adoption Process](https://www.edreports.org/resources/article/launch-and-implement)  [Selecting Great Materials is not Enough](https://www.edreports.org/resources/article/selecting-great-materials-is-not-enough) |  |
| * Articulate plans for short-term and long-term activities to support implementation (e.g., teacher and leader professional learning, necessary adjustments to district assessments, leadership walkthroughs to monitor implementation) and expectations for use. | [7 Best Practices for Launching Curriculum During Interrupted Schooling](https://www.edreports.org/resources/article/7-best-practices-for-launching-curriculum-during-interrupted-schooling)  [Refining Your Implementation](https://www.calcurriculum.org/implementation/index.html) |  |
| * Establish additional feedback mechanisms so professional learning can be responsive to teachers’ needs and address concerns. |  |  |
| * Ensure there is a structure and adequate time for the district staff who will train and support teachers to learn the materials themselves. |  |  |
| * Include in your professional learning plans the specific training site leaders will need to support teachers with timely, appropriate feedback. |  |  |

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