



LOS ANGELES UNIFIED SCHOOL DISTRICT REFERENCE GUIDE

TITLE: Targeting the Purchase of Textbooks, Grades K-8

NUMBER: REF-4159

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DATE: March 7, 2008

PURPOSE: To provide ordering instructions and an explanation of appropriate expenditures for state textbook funding.

MAJOR CHANGES This Reference Guide replaces REF-3540, Targeting the Purchase of Textbooks, Grades K-8, dated February 23, 2007 and contains updated District procedures and best practices for ordering textbooks to ensure textbook sufficiency.

INSTRUCTIONS: The following guidelines must be implemented:

ROUTING
Local District Superintendents
Local District Directors
Local District Instructional Coordinators
Local District Fiscal Services Managers
Principals

A. TARGETED AREAS FOR PURCHASE

In compliance with the mandates of *Williams* legislation, the District’s policy requires that each student, including English-language learners and those in special day classes, have a basic or basic-aligned to standards textbook for use in the core and required subjects of reading-language arts, history-social science, mathematics, science, health, and foreign language (when offered.) Students are to be assigned a single textbook in these subjects that they are to use both at home and in class. District policy does **not** allow the use of state textbook funding for the purchase of class sets in addition to the books issued directly to students.

Schools should have full sets of core and required textbooks for all students as all schools reported 100% sufficiency on their *Williams* certifications for the October 9, 2007, hearing.

Textbooks may fall within one of three categories:

- District Adopted Textbooks
- Approved Textbooks
- Supplemental Textbooks

District Adopted Textbooks: District adopted textbooks are the textbooks in the core and required subject areas that have been adopted for use in the District for grades K-12. These are the **only** textbooks that may be purchased with State textbook funding. The list of District Adopted Textbooks is available at the Textbook Services website, <http://textbookservices.lausd.net>.

District Approved Textbooks: District approved textbooks are additional textbooks in the core and required subject areas that have been approved by the District’s instructional units for use in the District for grades K-12, but have not gone through the formal State or District adoption process. As such, these books comply with the mandates of



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Williams legislation; however, these books may **not** be purchased with State textbook funding. The list of District Approved Textbooks is also available at the Textbook Services website, <http://textbookservices.lausd.net>.

Supplemental Textbooks: Supplemental textbooks are used to enhance the core instructional program. These books may be purchased with categorical or discretionary funds.

In order to ensure sufficient textbooks for students, elementary and middle schools are directed to target the expenditure of 2008-2009 State textbook funding for purchases of District Adopted textbooks only.

B. DETERMINING TEXTBOOK NEEDS

1. Inventory all textbooks to determine anticipated needs prior to attending the spring enrollment "Roadshow."
2. Remove obsolete and unused books and materials from classrooms and textbook room.
3. Review textbook inventory with Director of School Services at Roadshow.
4. Compare projected enrollment numbers and current inventory counts to target textbook purchases for the following school year.
5. Ensure that textbooks and instructional materials are ordered, to the extent practicable, before the school year begins as mandated in Education Code, Section 60252.
6. Immediately inventory and process books upon delivery. Complete the "online receiver" for both partial and complete orders.
7. Two weeks prior to opening a semester or track, compare existing textbook inventory to the projected enrollment in the core instructional programs taught at each grade level to identify possible insufficiencies or surpluses in a subject area. Review this inventory information with Local District personnel to ensure sufficiency and identify surpluses that can be shared with other schools.
8. Remedy identified insufficiencies prior to the beginning of instruction.

C. PRICE LISTS AND ORDER FORMS

Price lists and order forms are located on the Textbook Services webpage: <http://textbookservices.lausd.net> under Order Forms K-8. See Section D for information on Mathematics adoption ordering.

The forms are in Excel format. With the exception of the school information and quantity fields, the spreadsheet is locked. It will calculate prices including sales tax. It can be e-mailed from one site to another within the District. However, it should **not** be e-mailed to publishers. Publishers have been mandated by the District not to process orders unless they have a hard copy of the order with the principal's signature.



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The prices for state-adopted textbook series are contracted for two years. On June 30, 2008, schools should check the Textbooks Services website for updated pricing and order forms prior to completing orders. Science will have new pricing. To take advantage of current prices, be sure publishers receive the BPO **before** June 30, 2008.

Reading/Language Arts/English Language Development (RLAELD) will be adopted by the State Board of Education (SBE) in November 2008. The price list of currently adopted RLAELD books will expire when the SBE adopts the new instructional materials. To take advantage of current prices, be sure publishers receive the BPO **before** June 30, 2008. These books will be used until the RLAELD adoption is finalized and implementation begins July/September 2009.

The price lists and order forms include shipping on the unit cost of the textbook, but do **not** include state sales tax. If you are not using the electronic version of the forms, please calculate the 8.25% sales tax and enter it on the line provided on the forms.

D. MATHEMATICS ADOPTION

The State adopted mathematics textbooks in November 2007. Schools are required to replace mathematics textbooks with newly adopted books in July/September 2008. The current mathematics textbooks should be retained until the newly adopted textbooks are issued to the students.

Textbook Services will provide electronic order forms for mathematics textbooks in an Excel format that will compute totals and include the gratis package as soon as the District adoption and agreements with publishers have been finalized. It will be clearly marked "New Adoption." These spreadsheets will be posted on the Textbook Services website: <http://textbookservices.lausd.net> under Order Forms K-8 → Mathematics.

E. GRATIS ITEMS FOR NEW ADOPTIONS, NEW CLASSES AND/OR NEW SCHOOLS

Publishers will provide the greatest number of free materials the first year of every adoption. However, publishers will provide the first year gratis package for new schools and newly opened classrooms. The Textbook Services website provides forms for reorders as well as new schools and classrooms.

Review the cover page on the price list and order form for clarification of the gratis package. Some of the Excel spreadsheets will automatically calculate free items; some have to be added manually. The Textbook Services website also provides a list of publishers and vendors with publishers' representative names and phone numbers. Contact the publishers' representatives for clarification of the gratis packages.



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If the free items are not requested as part of the order, the publishers will not ship the free materials. Make sure to mark the number of free items in the “Free Quantity” line provided on the new schools or new classrooms order forms. When they are marked on the order and if the items are State-adopted, publishers will not charge additional shipping for the items. If you have any questions, ask the publisher before the order is sent.

F. TEXTBOOK ORDERING PROCEDURES

When placing BPO orders, Local Districts have agreed to implement the following best practices:

- All decisions for textbook ordering are coordinated by the Local District.
- Textbook funding remains at the Local District level.
- Local Districts will provide schools with a “Request for Textbooks” form that can be used for review, adjustments, and approval.
- Local Districts will invite publishers to the enrollment “RoadShow” and establish procedures to help principals write textbook orders based on enrollment projections provided at the meeting.
- The Local District will process the signed and completed “Request for Textbooks” form.
- Local District personnel will review orders to ensure that the requested books are appropriate for purchasing with State textbook money.
- The “Request for Textbook” form will be submitted to the Local District fiscal services manager for the funding line information.
- Local District support staff will input the BPO orders.
- The BPO will be printed at the Local District Office.
- The Local District superintendent or designee will sign off on the BPO.
- The Local District Office will mail the BPO to the publisher.
- The Local District Office will maintain a spreadsheet listing of all orders placed.
- The Local District Office will forward a copy of the BPO to the school attached to a cover memo listing the orders included.
- The school location will receive the books and verify quantities.
- The school location will input the “online receiver” into IFS for both partial and complete orders.
- Local District support staff will monitor the delivery of all the Local Districts’ BPOs and the timely completion of the “online receiver” by the school site.
- All documents will be retained on file as reference for school and Local District Certification of Textbook Sufficiency (see Reference Guide No. REF-3538, February 12, 2007) in compliance with state textbook funding and *Williams* legislation requirements.

Potential benefits realized from these practices include central ordering control, accurate initial order input including gratis items, elimination of some non-essential purchases, and greater control over receipt verification, thus reducing back end payment issues.



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G. DISPLAY

Textbook Services operates a permanent display of all state-adopted textbooks and instructional materials. The office is located at Adams Plaza, 1545 Wilshire Boulevard, Suite 200, Los Angeles, CA 90017, and is open from 8:00 a.m. to 4:30 p.m., Monday through Friday. Please call (213) 207-2280 for parking instructions.

RELATED RESOURCE:

BUL-2326.2, Textbook Policies and School Site Procedures
dated February 12, 2007

REF-1376, Procedures for Reporting Textbook Concerns,
dated October 25, 2004

REF-C-23, Commodity Code Usage, Business Services Division,
dated May 9, 2003.

ASSISTANCE:

- For reading program information, call the Local District Literacy Coordinator.
- For English Language Development Program information, call the Local District English Learner Coordinator.
- For mathematics program information, call the Local District Mathematics Coordinator.
- For state price lists and order forms information, refer to Section C, call Textbook Services at (213) 207-2280, or refer to the Textbook Services website: <http://textbookservices.lausd.net>.
- For budget information, call the Local District Fiscal Services Manager.
- For additional information about the BPO process, call Textbook Procurement Section at (562) 654-9308.



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Professional Learning, Development, and Leadership

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ATTACHMENT A

BOOK PURCHASE ORDER (BPO) PROCESS FLOWCHART Targeted Textbook Purchases

ACTIVITY	Order Preparation	Order Entry	Order Monitoring	Delivery and Receiving
RESPONSIBLE FUNCTIONAL UNIT(S)	Schools and Local District (LD) Office	Schools or Local District (LD) Office	Textbook Procurement Services (TPSS) and Local District Staff	Schools and Local District
PROCESS	<p>LD adheres to centralized ordering</p> <p>Schools obtain accurate pricing from Price List and Order Forms available on the Textbook Services webpage</p> <p>Schools work with publishers to ensure orders are correctly written to include gratis items</p> <p>Schools work with LDs to ensure orders are completed and input correctly into IFS</p>	<p>no</p> <p>yes</p> <p>BPO > \$1000</p> <p>For BPOs < \$1000, but > \$250, Principal to approve online & "SCHED" in IFS</p> <p>For BPOs > \$1000, LDs review & release before the BPO is "ACCP" in IFS*</p> <p>* LDs can enter BPOs for any amount greater than \$250 on behalf of their schools.</p>	<p>LD clerical support monitors delivery & helps resolve delivery delays*</p> <p>LDs assist schools by contacting publishers when BPO's approach 60 days ARO</p> <p>TPSS manages and distributes Opening Textbook Order Flag Reports* and BPO Aging spreadsheets.</p> <p>* The District requires publishers to deliver State-adopted textbooks within 60 days after Receipt of Order (ARO). * Green, yellow and red Flag Reports which indicate opening order placement are distributed to each Local District Superintendent and other instructional executives.</p>	<p>Publisher delivers order within 60 days</p> <p>School enters an "online" receiver into the IFS system</p> <p>LDs assist in resolving late deliveries*</p> <p>* In the event of an unusual delay causing a backorder, the 60 day requirement maybe extended by mutual agreement for order fulfillment.</p>
TIMELINE	Feb. 11 – Feb. 25, 2008	Feb. 26 – April 4, 2008	April 7 – May 30, 2008	May 15 – June 30, 2008