

## Alternatives to Piloting Textbooks



In lieu of traditional textbook piloting, districts can judiciously ask publishers' agents for extensive information about their own and competitors' products, consult with other teachers already using the new materials, and look at the results of publishers' own field tests.

CONNIE MUTHER

Depending on the state and subject, 20 to 40 percent of school districts pilot textbooks before purchase.<sup>1</sup> This makes piloting one of the most common methods for verifying the effectiveness of textbook programs. Unfortunately, the usual type of piloting rarely yields reliable results and may cause serious problems for some learners.

Piloting commonly means that teachers "try out" textbooks and their accompanying materials with students before committing to purchase. This is usually done in major K-8 subject adoptions. Many large urban districts "mass pilot" materials from different publishers (as many as 16 in one subject), although a more common practice is to "selectively pilot" only a few programs identified after extensive review. Most pilots continue for two to six months, or the better part of a year, although "split-year piloting" (piloting one program for half a year and then switching to another at mid-year) is a new trend enabling one teacher to experience two competing programs during the year. It is these specific practices that need to be re-evaluated.

### Why This Kind of Piloting Should Be Reevaluated

One factor to be considered when piloting is the Hawthorne effect. Pilot teachers, believing themselves to be singled out to evaluate materials, may invest more energy and commitment

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in the new materials than they normally would, skewing evaluation results.

Another consideration is that, according to research by Gene Hall and his colleagues at the University of Texas, it takes two to five years to fully implement and effectively use a new program. At the end of one full year 70 percent<sup>2</sup> of teachers are still using a program on a day-by-day mechanical basis,<sup>3</sup> focusing more on meeting their own needs than on the needs of their students. For several reasons, then valid evaluation results obtained after a year—or less—seem dubious.

And there are other problems. Rarely are pilots monitored with scientific accuracy. Different teachers use different and noncorresponding pieces of competing programs with undefined and variable target students. Although competing programs teach and test different content and skills, textbook test results and pilot teacher preferences often determine program effectiveness.

Moreover, these preferences can be manipulated by sales agents. As one former sales agent revealed, “I fulfill every need, desire, and fantasy of those pilot teachers.” This usually means supplying additional materials that might not be available (often due to the district’s financial and time constraints) when the program is finally selected and purchased. Some companies also influence results by requiring sales agents to identify the most respected, persuasive teachers—then supplying free materials only to them. These influential teachers often sway adoption decisions through the strength of their personalities rather than the strength of a program.

Pilot teachers can be further manipulated through inservice training, which most districts realize is essential. (Otherwise the program may fail due to incorrect use.) Better quality and more frequent training could result in a greater chance of success. Since this training is usually provided by the publisher’s program consultant, who normally covers a large geographic area, it is frequently scheduled during school hours.

What do students do while their teachers are given pilot inservice training? According to a former consultant, “the students were usually told to color, play a game, or complete some improvised busywork while I spent an hour or two with the teacher. If the adoption was large and the pilot teacher influential, I visited as often as I could—once a month if possible. I knew I was disrupting instruction, but I had to sell the books. Nobody seemed to realize that a consultant sells just as much as an agent. It’s called the ‘soft sell.’ It’s just not as direct.”

Although many average and above average students survive pilots, some less able students do not. They just begin to grasp the vocabulary, format, or procedures of a pilot program, only to be placed in another program the following year—or worse, into another pilot. Many cases can be cited at all levels, but especially at the 1st grade, of students who failed in reading or math not because of their lack of ability, understanding, or effort, but because the district piloted different programs before purchase.

### **Three Alternatives to Piloting**

How, then, can a district evaluate the effectiveness of a program before committing many years and thousands of dollars to one publisher? While all methods have flaws, the following three alternatives may yield more accurate results and be less costly to learners.

**Sales Agents.** Often during the slow summer months publishers train their nationwide sales staffs in “how to beat the competition.” Agents are taught, and encouraged to “mention” in school districts, the strengths and weaknesses of competitors’ programs. Unbeknownst to many agents, however, this information is often inaccurate, highlighting *perceived* weaknesses and not actual flaws. For many sales agents, perceived problems and actual problems are the same; both discredit the competition. But for selection committees the difference is critical.

To get accurate information, say to each agent, “We want to know where

other programs have problems, but we want only facts. If you can *prove* where another program is weak, prove it. Show us the pages, point out the flaw, or identify user schools having serious problems with a program. But unless you have proof, don't mention another publisher's product."

All programs have typographical and grammatical errors. Many programs have minor errors in accuracy. These are frequently listed in a publisher's competitive analysis. Number counts of certain activities are also frequently provided to show "more is better." If that's all an agent can cite, either the competitive program is successful—or the agent hasn't been provided with good competitive information.

What you want to see is an agent pulling competitors' materials for several grade levels off your shelves, opening to many pages, and pointing to the same consistent, poor information. It may be the same lesson taught repeatedly at every grade and never extending beyond it; or it may be an assignment requiring skills that have never been taught.

Listen attentively and write down every reference and comment. Once the agent has left, *always* return to the exact pages in the materials to verify this "proof." Is it really a problem, or has the agent tried to make an issue out of a nonissue? Has it been taken out of context? Is the same problem

evident in other chapters or grades—or is it an isolated example? If something looks very suspicious, contact the publisher and ask for an explanation. There may be a very simple, logical reason that has been overlooked in your study.

If there is a serious problem with any textbook, you need to know about it as soon as possible. Good agents will indirectly provide this information anyway. You're simply forcing the cards to be played face up where you have control.

*Teacher Users.* Teachers already using the program in other districts are the best source of information, but visiting them is time-consuming and should be reserved for final textbook candidates. Not only will you discover patterns of both strengths and weaknesses, but you will see how others use materials, organize for instruction, and observe a multitude of other unrelated, fascinating phenomena.

To begin this evaluation, obtain the names, telephone numbers, and addresses of user schools from each agent for selected programs (by this time you have narrowed the possibilities to one, two, or possibly three programs). It is critical to obtain both a name and number since many lists of user schools imply that the entire district uses the program when it may be only one school or class. Prepare a questionnaire to identify which districts are most similar to yours and then survey by phone.

Remember, your goal at this point is to identify those districts that most match yours in population, organization, and philosophy. Also, beware of positive answers. Most contact persons identified by agents were responsible for that textbook being selected and will recommend it.

Select a minimum of three districts for each program, then visit with a team of two to three committee members. Each team should visit every grade, speak with many teachers, and ask the same questions: "How's the program working? Any problems, questions, concerns? Can you show where? What do you like best, least? What do the students like best, least?"

**"Some companies . . . influence results by requiring sales agents to identify the most respected, persuasive teachers—then supplying free materials only to them."**

Where do students score highest, lowest? Can you identify a specific page, question, or example?"

Unique features will often be identified, although perceptions about their effectiveness may vary. One district may report, "Too many answers vary. We don't have time to correct all these papers." Yet another district may point to the same activities and say, "This program really teaches kids how to think. Look at all the analyzing and evaluating the questions require." It is up to you to determine if the program will be a plus or minus in *your* district.

Problems caused by poor instructional design will surface immediately. The same strand, grade, chapter, unit, test, skill, workbook, or question will be constantly cited as "difficult" or "the kids don't like it." When the same item is cited in three separate districts, there's obviously a problem for you to examine through a skills trace. (For specific details on how to do a skills trace, see *Educational Leadership*, December 1984, pp. 79-80.)

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You may also wish to try out part of a program with your students. Yes, this is piloting, but it's controlled piloting for a specific purpose. Examples might include having students see if they can follow the directions independently in workbooks, or asking your students to determine why students in another district might have disliked a unit, chapter, or story. This type of "piloting" is short, focused, easily monitored, won't disrupt the continuity of regular instruction, and is not manipulated by sales personnel.

There is no such thing as a perfect program, so be leery if you find one. Well-designed programs do have problems, but they are scattered throughout all grades and topics. Causes for these problems reflect the issues involved in using different materials for varied purposes on unique populations.

There are some areas of caution when visiting user schools:

1. Be sure all evaluators have the same written questions, and practice asking them. Valuable information can easily be missed if evaluators do not know how to pursue reasons or obtain specific page references or examples.

2. Try to identify districts that have used the program for more than a year (which is difficult if the program is new and there are no "users,"<sup>3</sup> or if you live in an adoption state and neighboring districts are buying at the same time).

3. Visit a minimum of three districts.

4. Always return to the textbook materials for verification.

**Field Test Results.** A third way to analyze textbook performance is to obtain a Learner Verification and Revision (LVR) statement from the publisher. This document identifies the process of field testing or user feedback, the results of program monitoring, and the specific revisions made in the program based on the results of these data. LVR statements spotlight problem areas; but remember, LVRs are written by the publisher with the ultimate intent of persuading you to buy.

Even if a program is newly created, the publisher should be able to provide results of field testing. Very small

publishers may have trouble providing impressive documentation, but even they can tell you over the telephone why and how certain books have been revised.

Read and compare LVR statements from all publishers. This is not time consuming, nor does it take long to recognize a sales pitch. For example, how important is it to have comments from teachers stating how "wonderful" the program is? Do three pages describing the authors and consultants inform you how well the program performed with students? Is it vital to know "that a number of typographical errors were noted" and have been corrected? Very simply, what you're looking for are problems identified by users and how they have been corrected in the new or revised edition.<sup>5</sup> For example, if an LVR reports that users have "questioned the content of the student workbooks," then you should examine new workbooks to see if they really are improved: do new pages support or enhance the concepts to be learned? Or has more of the same been added?<sup>6</sup>

Legally, about 10 percent of a program must be changed in order to change the copyright. Which 10 percent is not stipulated. Therefore the addition of a box of dittos at every grade level may constitute a 10 percent change. Changing the covers and some pictures may be 10 percent. Any LVR should state what has changed, why it was changed—and it should amount to 10 percent.

### **How It Can Work**

One publisher's LVR statement honestly reported that 1st grade teachers had problems with the phonics part of their reading program. The report further claimed the problem had been solved in the revised edition. Yet visits to user schools revealed that phonics was still a weakness in the newly revised edition. A skills trace of two phonic elements showed the cause of the problem to be inadequate instruction. The revised edition had merely added more practice when the cause—the instruction—had not been changed.



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However, this same program performed better overall than any of the competing programs. The recommendation: purchase the program with a service guarantee from the publisher to provide both inservice training for primary teachers in phonics and a system for the district to monitor and modify the program.

## Conclusion

There is no easy way to evaluate textbook performance, but a combination of these strategies is more direct, more accurate, and less time consuming than traditional piloting. Far more importantly, not one child will be used in a lengthy, uncontrollable experiment; not one teacher will be manipulated for the purpose of sales; and not one child will fail due to being placed in a pilot. □

I interviewed national sales managers and executives of six major publishers. Precise figures were not available; therefore this figure is estimated. Piloting occurs just as frequently in "adoption states," where a state committee preselects textbooks local districts may choose from, as it does in "open territories," where districts are free to choose any publisher's materials. The 40 percent high occurs in one state where piloting is recommended by the state department. The average would be closer to 25 percent, or one out of every four districts.

\*Interview with Gene Hall, The Research and Development Center for Teacher Education, University of Texas, Austin, 1984.

\*Gene Hall, S. Loucks, W. Rutherford, and B. Newlove, "Levels of Use of the Innovation: A Framework for Analyzing Innovation Adoption," *Journal of Teacher Education* 26, 1 (Spring 1975): 52-56.

\*Telephone interviews with top executives of several major publishers indicated detailed identification of specific field test teachers and schools would be provided on request.

\*For other methods of evaluating LVRS, contact Arthur Woodward, EPIE, P.O. Box 839, Water Mill, NY 11976.

\*For specific strategies of how to effectively evaluate workbooks and dittos, contact Jean Osborn, The Center for the Study of Reading, University of Illinois at Urbana-Champaign, 51 Gerty Drive, Champaign, IL 61820.

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