

**Instructional Materials Fund (IMF) Petition Request  
CALIFORNIA STATE BOARD OF EDUCATION  
FEBRUARY 2003 AGENDA  
Item No. W-11**

<p><b>SUBJECT:</b> Petition request under <i>Education Code</i> Section 60200(g) and 60421(d) by <b>Lake Tahoe Unified School District</b> to purchase nonadopted Instructional Resources (<i>Everyday Mathematics</i>, Grades K-3, c. 2001; Grades 4-6, c. 2002) using Instructional Materials Funding Realignment Program (IMFRP) monies.</p> <p><b>CDSIS:</b> 12-11-2002</p>	<p><u>  X  </u> ACTION  <u>      </u> INFORMATION  <u>      </u> PUBLIC HEARING</p>
---	---

**RECOMMENDATION:**

The Department recommendation: Approval from May 30, 2003 to June 30, 2005, on the condition that the district supplement *Everyday Mathematics*, Grades 4-6, as necessary for coverage of all mathematics content standards, and contingent on IMFRP funds being appropriated and allocated in 2002-2003 and in subsequent fiscal years.

---

**Summary of Previous State Board of Education Discussion and Action:**

The Petition process was continued in statute for use by districts with the new Instructional Materials Funding Realignment Program, AB 1781, Statutes of 2002 with *Education Code* Section **60421 (d)** “Notwithstanding any other provision of law, pursuant to subdivision (g) of Section **60200**, the State Board of Education may authorize a school district to **use any state basic instructional materials allowance** to purchase standards-aligned materials as specified within this part.”

In the last two years, four IMF petitions and twelve Schiff-Bustamante waiver requests have been submitted to the Board for various editions of *Everyday Mathematics*. Of these sixteen requests, fifteen were approved with conditions, typically a requirement that the district demonstrate that supplemental materials are used at certain grade levels to meet deficiencies in the *Everyday Mathematics* program. Susan Stickel, former chair of the Curriculum Commission, has reviewed several editions of the program at the request of the State Board. Most recently, the Board entertained three IMF petitions for the same program for which Lake Tahoe USD is currently seeking a petition at its September 2002 meeting; one of these petitions was approved without condition and the other two were approved with the condition that the district demonstrate supplemental coverage of the Mathematics Standards for grades 4-6.

---

## Summary of Key Issue(s).

The **Lake Tahoe Unified School District** requests approval of its petition pursuant to Education Code Section 60200 (g):

*“If a district board establishes to the satisfaction of the State Board that the state-adopted instructional materials do not promote the maximum efficiency of pupil learning in the district, the State Board shall authorize the district board to use its instructional materials allowance to purchase materials as specified by the State Board.”*

In addition, language within the new Instructional Materials Funding Realignment Program in Education Code Section 60421(d) specifically authorizes the State Board to grant waivers for the purchase of nonadopted materials:

*“Notwithstanding any other provision of law, pursuant to subdivision (g) of Section 60200, the State Board of Education may authorize a school district to use any state basic instructional materials allowance to purchase standards-aligned materials as specified within this part.”*

The district adopted mathematics standards in 1999 that are identical to the state standards. Following the adoption of these standards a mathematics committee that included representatives from each school site in the district met to review the *Mathematics Framework* and to oversee the mathematics program of the district. During the 2001-2002 school year, this committee reviewed the available programs and determined that *Everyday Mathematics* best met the needs of the district. In addition to a voluntary pilot conducted earlier, a more extended pilot of the program was conducted by forty K-6 teachers during the 2002-03 school year. These teachers received extensive training in the program. The teachers who participated in this extended pilot reported that they were “excited about the program,” and that students were “eagerly involved in the lessons and the depth of understanding was evident.”

State achievement data shows that the district has performed at a level that is near the state average for Mathematics in recent years. However, the district asserts that its performance improvements for Hispanic students (a 31% minority in the district) have been significant, with a rate of decline for students scoring below the 25% percentile that is twice the state average. In addition, the district’s performance in the Algebra Golden State Exam has shown a higher overall percentage of students scoring in the 4<sup>th</sup>-6<sup>th</sup> levels than the state average (although the percentage scoring at the highest level, level 6, is lower than the state average).

Student achievement data is attached as part of the district’s request.

Following earlier petition requests to purchase the *Everyday Mathematics* program using Instructional Materials Fund moneys, the State Board of Education asked Commissioner Stickel to review the new 2002 edition of the *Everyday Mathematics* program for grades 4-6. Commissioner Stickel found in her report to the Board that there were numerous areas where the Mathematics Standards were not met, particularly at the Grade 4 level. Pursuant to this recommendation the Board acted to approve these petition requests with the condition that the districts demonstrate supplemental coverage of these standards.

The district as stated that it is familiar with the content of Commissioner Stickel’s report, and that a committee of grade 4-6 pilot teachers will work this spring with *Everyday Mathematics* trainers to develop strategies to meet the standards that are not adequately addressed in the program. The district also states that it expects a supplemental guide to *Everyday Mathematics* Grades 4-6 to be released in the fall of 2003.

**Department Recommendation**

The Department recommendation is for approval of the petition request from 5/30/03 through 6/30/05, with the condition that the district supplement *Everyday Mathematics*, Grades 4-6, as necessary for coverage of all mathematics content standards, and contingent on IMFRP funds being appropriated and allocated in 2002-2003 and in subsequent fiscal years.

---

Authority for the petition: **E.C. 60421 (d) and 60200(g)**

Local Board approval: November 12, 2002

Public hearing held on: November 12, 2002

---

***Fiscal Analysis (as appropriate)***

<b>Estimated cost of requested materials:</b>	\$150,000
<b>LEA's estimated K-8 Instructional Materials Block Grant for the school year:</b>	\$180,000
<b>Representing % of total K-8 IM Block Grant:</b>	83%

**Cost estimate for Subsequent Years**

<b>Estimated cost of consumables on a yearly basis following the adoption:</b>	\$30,000
<b>LEA's estimated K-8 Instructional Materials Block Grant for future school years:</b>	\$180,000
<b>Representing % of total K-8 IM Block Grant:</b>	30%

---

**Background Information is attached to this Agenda Item.**