



The Experts in Textbook Management

Principles of Textbook Management

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Hayes Software Systems

1. *Designate a Textbook Coordinator/Manager with authority to manage the inventory.*
2. *Set up some type of central, secured textbook storage space/facility.*
3. *Establish or expand Board of Education-approved policy statements regarding textbooks to include personal responsibility, accountability, and monetary consequences for everyone involved with textbooks – students, parents, teachers, administrators, school staff. Include a statement governing the expected "life" of a textbook within the district or school.*
4. *Publish an annual Price List of textbooks in use within the district or school.*
5. *Establish a textbook inventory baseline as the result of a thorough physical inventory.*
6. *Maintain complete records and documentation of all orders and receipts as these impact the baseline textbook inventory and future personal accountability.*
7. *Maintain complete records and documentation of distributions to campuses and/or teachers and/or students and returns (books or monies) from campuses and/or teachers and/or students.*
8. *Require standard procedures and documentation for all transfers between campuses or teachers.*
9. *Issue periodic reports to all administrators interested in textbook accountability describing the status of the textbook inventory.*
10. *Take action immediately in the event of a reported loss, shipping error, etc.*
11. *Adopt a policy describing the minimal "coverage" allowable for copies of textbooks in each course/subject area.*
12. *Use current enrollment (grade and/or course) as the basis for determining the "need" for additional copies of textbooks. Before the Annual Order or any Supplemental Requisition is placed adjust the order to reflect revised or actual enrollments.*
13. *Conduct an annual physical inventory of all textbooks.*
14. *Include an assessment of the success of textbook management as part of the annual administrative/staff evaluation.*

Administering Textbooks
Is An Exercise in
ASSET Management



Administering Textbooks Is An Exercise in ASSET Management

- Given the value of textbooks, as much as a quarter of a million dollars or more, in many school districts, there is a need to view books as the assets they are.
- Chief purpose of asset management is to preserve and protect the asset in question.
- Ultimate responsibility lies with school administration.

I want to emphasize the word “Management” because too often we look at taking care of textbooks as just a part of the teacher’s job or merely a clerical function. I believe that while teachers are responsible for helping to manage the textbooks involved with their students and classes, the ultimate responsibility lies with school administration. We hire teachers to teach. We hire administrators to ensure that we get the most for our money. Making sure the public gets its money’s worth is one of the most important aspects of the school administrator’s job.

Administering Textbooks Is An Exercise in ASSET Management

- ✿ Textbook life is more than 1 year
In Texas books are adopted for 6-8 years
- ✿ Books are re-used for their life
Your responsibility is to see that books last for the period of adoption
- ✿ Cheaper to repair than to replace
Have a formal procedure for rebinding or repair.

In Texas, books are adopted for between 6 and 8 years, generally speaking. This ensures that textbook content is reasonably up-to-date. Your responsibility is to see to it that the books last at least this period of time. Anything less than this could be seen as failure on your part as a manager.

You are expected to re-use textbooks year after year. Consequently, if books get lost they will have to be replaced. If you ignore the responsibility for getting the books back you may as well say that your expectation is that textbooks do not have a life of more than one year.

When TEA extends a title's adoption period, you have the responsibility to plan for this and make sure that you are able to live with the consequences of this state-level decision. No matter how successful you are, some books will wear out. Some books will contain torn pages. Some books will be scribble in. Replacing the book regardless of the extent of the damage is not the only way to proceed.

The Average Value of
Textbooks:

of Students x \$300.00



In most schools each student uses between 6 and 8 textbooks each year.
At an average cost between \$40 and \$50 per book, you are looking at about
\$300 dollars worth of books for each student per year.

The Average Value of
Textbooks:

1,000 students = \$300,000



In most schools no one has taken the time to determine the value of the textbooks in use at the school. As a result, the priority of caring for the books is determined more by the whim of the administrator than by economics. Once people are aware of the value of the books that are involved with, their attitude toward protecting them tends to change in a much more positive direction. Public awareness is very useful. Many schools send contract letters to parents, post price list, present \$ amounts to the PTA and present statement of charges to the board.

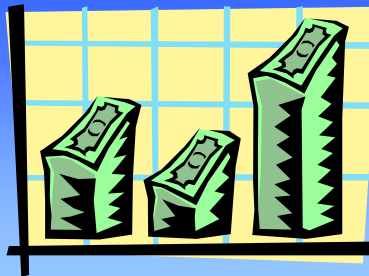
Textbooks = Problem

Costs to replace books

Records inaccurate

System isn't working

What about **YOUR** situation?



The cost of textbooks is outstripping inflation by a wide measure. It is helping to drive the cost of public school education up while, at the same time, providing no more for the dollar than was available just 5 years ago.

Schools are running harder and faster just to stand still! Every \$1,000 spent to replace textbooks means one less computer available for use in the school. Every \$10,000 spent to replace textbooks means one less clerical person to help overworked school staffs.

If your school district is growing then the squeeze on the textbook budget is getting worse and worse. Yet, you are expected to provide textbooks for all students. Just try explaining to parents that you don't have a textbook for their child because some students didn't return their books given to them last year!

Lost books are not a "cost of doing business" to be budgeted for each year like xerox paper, magic markers or utility bills. If you do not believe something needs to be done to reduce these losses; that something **CAN** be done to reduce to these losses, each and every year, than perhaps you are not the individual that should be managing textbooks.

Textbooks = Problem

Costs to replace books

Per year costs to replace books

Anywhere from \$4,000 to \$20,000+

High School = Loss leader

Some cases are \$20,000+ just for one high school.

The vast majority of the losses can be found at the high school level. Elementary schools tend to have the fewest lost books. Junior high schools and middle schools are somewhere in between.

One of the key reasons you must do something about textbook losses is that the ratio of books allocated to a school district has decreased significantly over the last several years. This means that losses must be replaced to allow enough books for current students. This makes it even more important to replace them as they are lost.

I do not know how many times we have heard from coordinators that they have campuses with losses upwards of \$30,000 per year. The most absurd amount that I have personally heard of was over \$80,000 at one high school. I can not tell you which Texas school it was, but to me that is unacceptable incompetence and should not have been tolerated. I heard it was \$60,000 the year before.

Cost = Problem

What is the cause for loss?



- ❖ Incomplete or inaccurate records
- ❖ Teachers are not good record keepers
- ❖ System for record keeping is flawed
 - assumes teacher is the key record keeper

We hear that the reason for loss is incomplete and/or inaccurate records.

Teachers are not good record keepers. Teachers are not hired to be record clerks. As we've seen our present system merely increases the amount of record keeping. Adding clerical help will make a positive difference. Adding the accuracy of computers will make an even more positive difference.

Cost = Problem

Time to change the system?



You know it is time when...

- 🌸 Books are being taken home by students
Teacher still responsible
- 🌸 Parents are unaware of the books for which their child is responsible
- 🌸 More materials are being used that have to be tracked.

Given everything we have presented in last few minutes you should agree that there isn't enough time available to economically take care of the increased volume of records required to account for all the educational materials in use in the district. Unless we can provide additional resources, the accuracy of this huge increase in records will fall steadily. How do we go about making a positive change in the system?

Systematic Textbook
Management
involves

CONTROL & RECOVERY

Since we have determined that our system has to change, what are the key elements of effective textbook management? They involve the Control we have over textbooks and the degree to which we are successful at Recovering all the books distributed to teachers and students.

Control requires that you

- ❖ Possess the ability to exercise it
- ❖ Desire to exercise it
- ❖ Have the authority to exercise it



I am going to assume that one of the reasons you are here is that you believe you have the management ability and skills to do the job and you really want to make a difference in your school district. The concept of authority is the most **abused** concept in management – in schools, in business in the military, even in the home. When a person is given responsibility for getting a job done, he or she must have at least the implied permission of upper level management to do whatever is necessary and prudent to get it done. For example, if I am expected to make sure that all students and teachers have the textbooks they need, then I should have the authority to veto a request for books if I find they are not necessary. If I find that a campus textbook manager is not doing the kind of job I expect to have done, then I should be able to confront that person, directly, and insist that changes be made.

And when the person I am working with does not like what I am doing and appeals my decisions to a higher authority then I should be backed up, regardless. If higher authority does not like what I am doing, that higher authority should remove me!

You will help your school district if you get involved in the selection of a textbook coordinator at the campus level. You need to purposefully search for people who would enjoy managing textbooks. Today, particularly at the secondary campus level the newest administrator on campus gets the textbook job. That should be the first change. At the beginning of every school year, we receive too many calls from new campus coordinators that have had the job thrown in their laps. Many times they have not even been given direction from their predecessor let alone training. If you find someone that is good at the job why let them get away?

Control of

🎯 Resources

people, time and money

🎯 Practices

how things get done
and when

🎯 Outcomes



Resources – how well these are controlled reflects directly on the success of the manager. All three must be effectively managed.

Practices – refers to the things we do, how we do them and when they get done.

If you have control of these you will have control of the outcomes

Administration is the key to control of personnel. A strong administrator makes all the difference. Unless the administration wants it to happen and works to make it happen textbook losses will continue and the bill will keep getting larger and larger.

Control requires

- ✿ Skill and creativity in managing resources
- ✿ Knowledge of what to do and how to do it
- ✿ Specific, achievable objectives



Just because “we’ve always done it this way” is not a reason for failing to change. You need to “think outside the box” about how to get the job done.

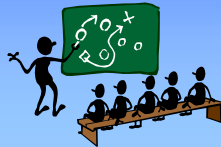
If you want to reduce losses, you must first make your campuses aware of what their losses are. Then set an objective for loss reduction.

Systematic Textbook
Management:
involves
Control and
RECOVERY

Let's look at what is
behind improving your
success rate in
recovering lost or missing
books.

Recovery assumes you

- 📌 Know how many textbooks are involved
- 📌 Know who has which textbooks
- 📌 Know what you can accomplish
- 📌 Have a plan to achieve objectives



In Texas you have your Annual Statement of Charges. This is your bible as far as most school districts are concerned. You can get an up-to-date copy of this report directly from EMAT.

Part of the concept of “authority” and “responsibility” is knowing where you start from. Before you do anything else I strongly advise that you get yourself in a position to know exactly how many textbooks your district is supposed to have and let top administration and the Board know this.

This means you need to know which campuses have which books and how many copies of each title they have. This means that a physical inventory of textbooks must be taken. TEA regulations say it is to be taken every year. That may be somewhat impractical at large districts. But, you can alter which ones get audited if necessary.

Both district and campus textbook managers need to be able to verify that the number of books in the district warehouse or the campus bookroom agrees with the difference between the total number of books you are supposed to have and the number of books distributed to others.

Recovery requires

🎨 Timeliness of actions

Don't wait until all the ducks are in a row

🎨 Documented findings

Take an inventory and show differences

🎨 Consistent implementation

There are no favorites
– you are not the “nice”
guy or gal.
Follow the rules.



Timeliness of actions:

Don't wait until all the ducks are lined up – they may never be lined up perfectly! Take an inventory and show any differences which may be found. (Let those responsible “correct” you if they don't like the results by showing you exactly where you missed out.) If an error exists, correct it immediately, thank the person for enlightening you and then take steps to ensure that the mistake cannot happen a second time. For example – a campus claims it never received certain books. There is no record of the delivery. Make sure that in the future no books are delivered to THAT campus unless the campus textbook custodian is available to sign for them and that there is a signed receipt on file in your files for all deliveries.

Consistent Implementation – You need to ensure consistency, There are no favorites – there is no room for Mr. “nice” guy.



The Principles
(& practical implications)

The Principles and practical IMPLICATIONS.

Every student and every teacher



Is entitled to the textbook materials necessary to achieve their learning and teaching objectives.

Read Slide.



Every Student is
ENTITLED
to a textbook



The operative word is “entitled”. I know of no state law or district policy anywhere which states that textbooks are the personal property of the teacher or the students. We are talking only about entitlements NOT ownership here. This is a major distinction.

Every student is
ENTITLED
to a textbook
BUT

🚫 Not an unlimited supply

A student is entitled to books but, if after receiving an initial supply, the student needs more because the books were not protected or that the student failed to meet his/her responsibilities, here, the student does not have to be given another book to TREAT AS HIS/HER PROPERTY.

Teachers need to be made to understand that the student is not entitled to a 2nd book but may have ACCESS to an additional copy DURING CLASS time only.

The student has to bear the consequences of not taking care of the property of the district when the book is missing.

Not an Unlimited Supply

Texas & Quotas

A Reasonable “Overage”

🍷 Course/grade enrollment

🍷 Percentage Factor

🍷 Needs across the district

Let’s talk more about this lack of an unlimited supply.

Texas is the only state in the US where the State owns the textbooks. It sets the rules. Your most accurate enrollment counts are contained in your Student Accounting system. These are the files TEA auditors use when they have you conduct a desktop audit. You must present TEA with actual class lists and the totals must add up to cover the number of books you have. If they don’t TEA has the right to insist that you return the extra books. The State will provide additional copies of books to meet emergencies based on the actual enrollment in a course. That quota is expressed as a percentage. This percentage has been shrinking over the past few years from 110% to 101%.

Every student is
ENTITLED
to a textbook
BUT



- 🌸 Not an unlimited supply
- 🌸 Textbooks are loaned public property
 - 🌸 Students, teachers and parents do not understand this concept of “loaned public property”.
 - 🌸 Textbooks available on loan to student or teacher through the district acting as an agent of the State of Texas.

Some teachers are not aware of their responsibility to protect books from misuse. Some teachers believe that the book is their property to mark up and use as they see necessary.

Students seldom understand this concept at all.

Loaned Public Property

- 📖 One textbook per student per course/subject
- 📖 Payment is required if lost or damaged
 - 💰 Cash money
 - 📅 Payment plan
 - 👷 Working off debt



Let's talk more about Loaned Public Property.

Once a student is issued a book it may not be replaced unless the student either pays for the book or returns it. THAT is the law in the STATE of TEXAS.

Student should be supplied a textbook to use while in the classroom. The book should not be removed from the classroom.

Payment is required if lost or damaged.

Every student is
ENTITLED
to a textbook
BUT



- Not an unlimited supply
- Loaned public property
- Irresponsibility has consequences

Given that textbooks are “loaned public property” , everyone involved needs to understand the consequences for anyone not meeting their responsibility to protect the public’s property. People need to know **what** those consequences are and that they will be applied!

Schools have the obligation to teach responsibility to our youth. If we only “talk” about what may be done but never do anything we are telling youth that we don’t mean what we say.

Irresponsibility has Consequences

❖ Contact the new/old school (Transfers)

- ❖ Refuse a book if owed for elsewhere
- ❖ Refuse a book if owed for in the same course

❖ Deny Privileges

- ❖ TEA attendance form
- ❖ Purchase of school annual
- ❖ Revoke parking privileges
- ❖ Attendance at "extra" curricula activities
- ❖ In school suspension
- ❖ Boot the car
- ❖ Withhold report card
- ❖ Work off debt

Contact school- We don't typically do this but the Texas Law clearly implies that this should be done. One book per student ANYWHERE in Texas.

Biggest offenders are big school districts. Should check with sending school for all outstanding debts.

So what else can be done?

Deny Privileges –

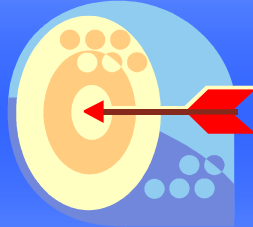
Begin to think "outside the box" Students do not have "rights" to any of these "extras". It is more important that students learn responsibility than to attend a basketball game. Schools have an obligation to teach students that there are consequences for irresponsibility in life.

Taking privileges away is very often perceived by students as more painful than coming up with the money necessary to pay for a book.

Making sure penalties are applied and applied in an appropriate and timely manner says much more to students than anything you can tell them in words or on a printed page.

Working off debt. The campus textbook manager needs to be creative here. "Make work" is not acceptable. Removing gum from furniture, sweeping the halls, policing the campus grounds, etc are all legitimate jobs and send a message to all students that their care of their textbooks is serious business.

Clear objectives are
communicated to all
involved

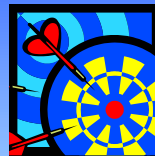


Effective textbook
management insists that
objectives be set for the
people involved.

If objectives are **not** set, how do the people know when they are doing an effective job?

Clear objectives are communicated for all involved

- 📌 Set objectives cooperatively rather than dictatorially.
- 📌 Objectives should be quantifiable.
- 📌 Set consequences for unmet objectives.



For example – Losses will be reduced by 70% this school year. Books unaccounted for will be “0” by June 30. All books may not be collected or paid for but at least you will know who still has them!

Objectives should be quantifiable – a clear definition of a “lost book” should be developed. In large school districts, meet with a small group of administrators recognized throughout the district as excellent campus administrators. Hold one meeting during which the definitions will be determined. Then publicize the results quickly and widely.

Then finally

Set consequences for unmet objectives.

**DISTRICT
Administration is
ultimately responsible
for textbooks**



Who is TEA going to
present a bill to after
completing an audit of
textbooks?

Authority is delegated to school administrators

By law, the school principal is the legal representative of the local board of education.

Other administrators, such as the assistant principal, get their authority as delegated from the principal.

Administration is responsible for textbooks

Who else has authority to...

- ❑ establish rules school-wide?
- ❑ enforce rules school-wide?
- ❑ invoke higher authority?
- ❑ bring legal action?



Read slide.



The Textbook Coordinator

Implements policies and
procedures

READ SLOWLY and emphasize.

You will determine how seriously everyone in your district will take textbook management by how well you do this one task.

The Textbook Coordinator

Has authority to manage
textbooks

You must make sure your authority is clearly defined and authenticated.

Authority requires

- ❖ Approved, written policies
- ❖ Tools to implement policy
- ❖ School board approval
- ❖ Faculty acceptance
- ❖ Student handbook



How many of you have written policy statements about what is expected of students and their use of textbooks?

How many of you have provided the necessary tools to carry out the expectations of set policy?

How many have written policy statements regarding the instructional materials provided to teachers in the employment contract?

How many have policy statements regarding protecting textbooks in the board of education's policy manual?

You cannot do the job without the help of the teachers. They frequently need education, here. It is your job to see that they get this education.

Make sure the Student handbook is understood by everyone and not there just for window dressing.

Spell out what constitutes a "lost book". What does "Damaged" mean? What are the penalties involved? Refer to State law as well as to your district's Board of Education policies.

Textbook Coordinator

- Has authority to manage the textbooks
- Has approved, written policies and procedures in place to handle the tasks
 - Calendar
 - Policy

A textbook management manual for campus textbook custodians is a must. It guarantees continuity from year-to-year in what must be done and how it must be done.

Include such things as:

A calendar of events involving textbooks (ordering deadlines, book check dates etc.)

Procedures for ordering books, receiving books, distributing books, returning books.

Policies governing payments for books, transfers of books between teachers or campuses, availability of books in classrooms.

CALENDAR – Texas

PROCEDURES – Show Table of contents.

Textbook Coordinator

📌 *Expected to implement*
policies and procedures

📌 Policy manual



You (Textbook Coordinator) are the one person in the organization to whom everyone turns when a problem comes up about textbooks.

You along with campus administrators need to develop policy in reference to textbooks.

Textbook Coordinator

- Policy manual should address responsibilities of
 - [Board of trustees](#)
 - [Superintendent](#)
 - [District textbook coordinator](#)
 - [Campus textbook coordinator](#)
 - [Teacher](#)
 - [Student and parent](#)

You have the responsibility to see that everyone understands what your policies and procedures are for managing textbooks in the organization as well as what you will do if they are ignored or not followed.

Hyperlinks to LISD Manual

Debbie

Website

Textbook Coordinator

Policy manual should outline processes

Campus level

- Ordering
- Quotas
- Special Populations
- Consumable Textbooks
- Highlighting
- Textbook Security
- Expired Adoptions
- Damaged/Lost Textbooks
- Book Covers
- Textbook Audits
- Audit Protocol

District level

- Campus Transfers
- Textbook Funds
- Fines
- Catastrophic Loss
- Textbook Selection

HyperLink – Campus and District processes

Textbook Coordinator

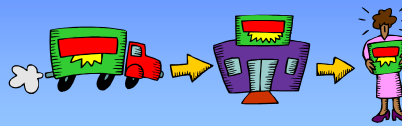
Tools to accomplish Objectives

Continuity of process

Paper system

Computerized system

© Hayes



You need to provide the tools to meet the expectation of the policies.

Textbook Coordinator

Work Smarter
Not
harder



If you believe that you have to do everything yourself you will fail because you will not have the time to make sure every job is getting done. You will get buried in the details. Involve your campus textbook coordinators in the process of developing the system so that they have ownership in the processes. This will give them a better understanding of the “big picture” and hopefully inspire them to be a part of making the system successful.