

# White Paper

## Proven Processes for Textbook Management

### Recover Dollars for Your District through a Textbook Management System

#### Overview:

#### Textbooks Can Cost Your District Hundreds of Dollars Per Student

Textbooks are one of the highest annual costs in your district. In most districts, each student walks out of the building every day with hundreds of dollars in textbooks. These textbooks are purchased with a planned life of several years. A textbook management system can help ensure that your district receives the highest return on investment for your financial and curriculum goals in the area of textbook purchases.

This paper is designed to help district and school administrators understand the impact and results associated with the implementation of a district-wide textbook management system, no matter what size district.

To support your needs, the paper is organized into four primary areas:

#### 1. How can textbook management help my district?

Learn how districts are focusing on improvements in the management of textbook resources and the potential benefits and savings that can be obtained.

#### 2. What will it take to make this happen?

Gain an overview of key steps and considerations that are critical to the success of your textbook management improvement effort.

#### 3. What should I expect from the vendor?

Pinpoint how to choose the right partner for achieving your goals, setting you on the path for success. Identify key areas of support to expect from your vendor.

#### 4. Getting started...

With the right partner, implementing this process should be efficient and uncomplicated for your district.

## 1. How Can Textbook Management Help My District?

Districts spend a significant portion of their budget each year on new and replacement textbooks. In the United States, districts spend over \$4 billion each year on new textbooks and close to \$1 billion each year on replacement textbooks. Purchasing and financial systems typically support the processes of textbook procurement from provider (publishers and/or depositories, or in some cases, the state department of education) to school; however, once the books arrive, districts often have little technology support to track and monitor the actual textbooks for the life of the adoption period. There is usually limited data available to identify where the books are actually located, when and if they are being used to support the curriculum and how many of the copies might still remain available for use.

### **Districts May Be Losing Anywhere from 5 to 10% of Their Textbook Inventory Each Year**

With a lack of technology and systems support for this area in most districts, it's no wonder that many schools resort to over-ordering just to feel confident that there will be enough materials to support the students. However, in this era of reduced budgets and increased accountability, it's critical that districts take steps to improve management of their textbook resources. Districts may be losing anywhere from 5% to 10% of their textbook inventory each year. Unnecessary purchases (stockpiling and excess purchases) may be inflating textbook budgets far beyond where they need to be. In some cases, districts are still vulnerable to risk of compliance, equity and performance measures due to the fact that students do not have access to the textbooks they need.

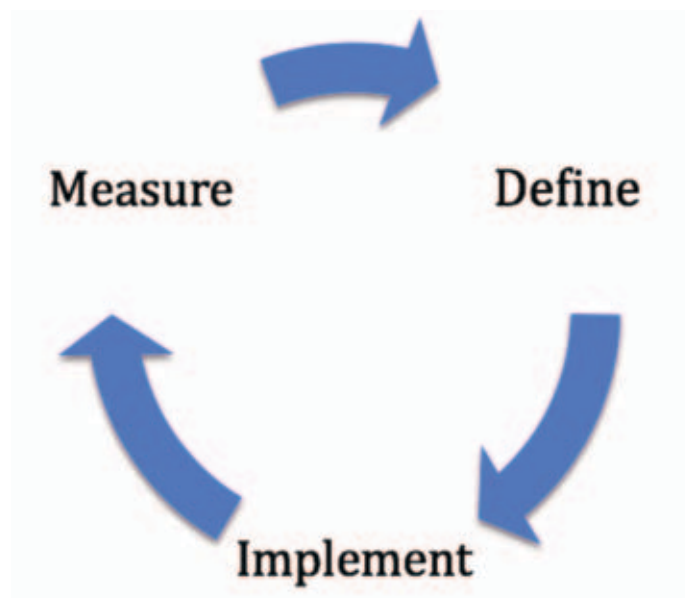
### **Savings in Managing Textbooks Can Help to Fund Improvements in Other Areas**

A comprehensive textbook management system for the district can assist you in reducing costs for new and replacement textbook purchases, improve accountability for student and staff textbook management, and reduce shortages and surplus for textbooks. Savings obtained in textbook management can help to fund improvements in other areas and meet other district goals. The system can streamline and improve access to current information on textbook inventory and usage at all locations.

## 2. What Will It Take to Make This Happen?

Before you begin your textbook management implementation project, it's helpful to step back and outline what you hope to accomplish. You can approach this project with proven process improvement techniques. At a high level, the key steps involve:

- Defining your textbook management improvement goals.
- Implementing improvements.
- Measuring results.



This cycle can be repeated over the course of a few school years to make incremental improvements over time throughout your district.

### **2.1 Defining Textbook Management Improvement Goals**

Let's take a look at considerations you should make in terms of defining your textbook management improvement goals. There are multiple levels of improvements that can be obtained. Your ability to improve accountability and reduce textbook costs (and make funding available for other purposes) will increase with each level of improvement that your district achieves. It's important for your district to define specific and realistic goals regarding the level of improvement you want to achieve and the timeframe in which you hope to achieve those goals.

### Set the Foundation: One Step at a Time

If your current processes don't support having a district-wide view of your textbook resources, just getting to the first level of improvements outlined in the next section can provide for a strong return on investment. A good textbook management system will help support your school and district at each improvement level outlined below. Each level is dependent on and builds upon the prior level.

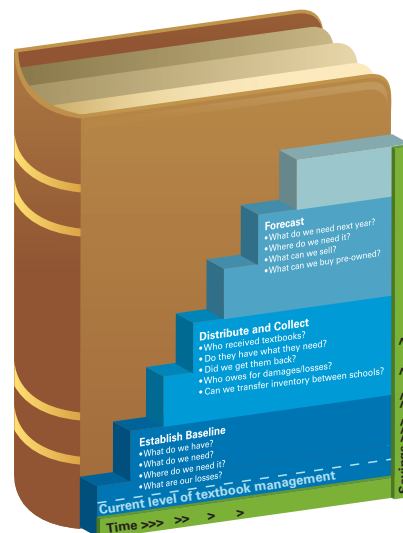
You will want to determine up-front how you will measure the success of your project in the areas outlined below. What level of improvement do you hope to achieve and how do you plan to measure your success? The district may want to pilot this process improvement project at a subset of the locations in the district. Recognize that your project team will learn what works well in your environment as you take steps to make improvements. You may want to focus your improvement process on just a few locations initially, and then make adjustments to your approach as move on to other locations in your district.

The levels of textbook management improvement that your district can work towards include:

1. **Establish a baseline**—Know what you have at each location and monitor changes.
2. **Track distribution and collection**—minimize losses and damage and ensure each student has what they need.
3. **Minimize purchases**—Forecast purchases and/or reallocate your textbooks based on enrollment and inventory.

It's not necessary to tackle all of these areas at the same time. Since each level builds on another, ensure that you have a good foundation in place before you move onto the next level.

### The 3 Levels of Textbook Management Improvement



#### Level 1: Establish Your Baseline

##### Know What You Have and Monitor Changes

To achieve the first level of improvement, you will need to have some basic measures of what textbooks you have in place. You can't start improvements until you have some measures to start with. You need to know exactly how many copies of each primary textbook title that you have at each school within your district. It's not necessary to know the quantity of every individual type of instructional material you have on-hand if you are just starting out. But it is important to know how many of each core student textbook you have for any textbook adoption that is expected to last more than five years. Decide which textbook titles you are most interested in tracking. The goal at this level is to know how many—the specific quantity—of each title that you have available at each location. Additional tips on how to collect this information are outlined later in this document.

##### Monitor Changes in Quantities

Once you have developed a baseline inventory of textbooks and how many of each title you have at each location, you are ready for the other aspect of this level— monitoring changes to those quantities. It's also important to have processes and procedures in place to monitor any changes to these quantities in a given time period. Textbook adoptions are intended to last for at least five years and sometimes may extend considerably longer (especially in these tougher funding times). Beyond knowing what you have at any given time, you need to pay attention to how and why your inventory of textbooks is changing.

## Understand How and Why Your Textbook Inventory Is Changing

There are good reasons and not-so-good reasons for quantities to change.

- Are students or teachers losing books?
- Did you send books to another school?
- Did you receive books from another school?
- Did you purchase new or replacement books this year?

By developing the processes to monitor the changes in quantities of textbooks at your school, you will be taking steps to better control your textbook inventory and improve accountability. If you have measures on what happened to your textbooks at a location in one period of time, you can focus your activities on actions that move those measures to where you want them in future periods.

## Monitoring + Understanding Fluctuation = Minimizing Purchases

The key point about this first level of textbook improvement is that you can accomplish quite a bit just by knowing what you have available for use in the district or in your school, and tracking the changes to those quantities each year. If you are measuring what you have (knowing the quantity of books you have for each key title) and measuring how those quantities change over a period of time, you will have significant facts from which to build on other improvement areas. Your replacement book purchases can be minimized because you will know exactly what you have on-hand at any location at any time.

## Transfer Excess Inventory

If you have multiple locations in your district, you can use this information to move surplus books to other locations that have shortages. In larger districts, a savings gained by transferring excess inventory to where it is needed pays for your investment in the system in the first year. If you are a single location, just knowing how the quantity of books changed over time will provide you with information on where to focus as you move onto the next levels of improvement.



*To make it easy, barcoding of textbooks can be done in stages.*

## Level 2: Track Distribution

### Minimize Losses and Damage—Ensure Students Have Their Textbooks

Once you have a handle on how many books are in your inventory, you can begin to focus on another significant contributor to your book budget—lost and damaged books. In the initial level of textbook management, you track changes in quantities. One likely reason that your textbook quantity may go down each year is lost textbooks. If you aren't tracking accountability for textbooks at the teacher and student level, your ability to reduce lost and damaged book costs is impacted. Higher levels of lost and damaged textbooks lead to higher levels of textbook replacement costs.

## Barcode Your Textbooks

The first step in getting to this next level is to place barcode labels on each textbook that you want to track. Barcoding textbooks can seem like a daunting task, but it's actually something that can be accomplished fairly quickly for each school. Although it's easiest to barcode textbooks when they are all together in one place (for example, after they have been collected at the end of the year—or for new textbooks, once they arrive), textbooks can be barcoded effectively during the school year.

Each textbook will typically have two labels applied. The first label is the barcode label and it is usually placed on the top back cover of the book. The second label is a security strip containing the barcode number. This label is usually placed along the spine or on the title page of the book. This second label allows the school or district to identify the book's barcode number if the cover barcode label is damaged or removed.



Districts can choose to either barcode the textbooks with available staff, volunteers/parents, or students—or arrange for services from an outside vendor to get the job done. Ensure your vendor has proven techniques for getting textbooks barcoded as quickly and as easily as possible.

### Barcodes Help Track Accountability at the Teacher or Student Level

Once books are barcoded, a textbook management system allows you to record which students or teachers are responsible for which specific textbooks when the textbooks are distributed. You can define whether you want to track accountability at just the teacher level (i.e. make the teacher responsible for a classroom set of materials supplied for use by multiple classes) or at the student level (i.e. each student is responsible for the textbooks issued to that student). The system should track the distribution of materials at either level.

### Barcodes Help Automate Reminders and Identify Lost and Found Textbooks

After identifying a student or teacher in the system, it just takes one scan of the barcode label on each textbook to record the responsibility. The textbook management system provides receipts, notices/letters and various reports to communicate obligations for textbooks. The mere task of recording textbook obligations will immediately help to ensure that textbooks are returned—and will increase the usable lifespan of your textbooks. If any lost textbooks are found (for example, in a lunchroom or on a bus), the books can simply be scanned to determine to whom they belong.

As textbooks are collected, another scan relieves the student or teacher of their textbook obligation. The system should also support fine/fee assessment and payment tracking for fines assessed for lost and damaged books. Your district may already have policies in place regarding how and when you can collect fines for outstanding obligations from students and staff. Other policies may exist that outline steps in regard to textbooks when students transfer within the district and when students leave or graduate from the district.



*Scanners make barcoding quick and easy.*

### Barcodes Ensure Each Student Has the Textbooks Required to Succeed

By recording the accountability of textbooks at the student level, you are also taking steps to ensure that each student has the textbooks they need to meet their learning goals. Since the textbook management system contains information on the classes being held, the students enrolled in those classes, and the required textbooks for those classes, the system can report if students have received the textbooks they are supposed to have. This reporting capability is critical to support compliance requirements for access to textbook resources and can also be used to audit processes based on textbook management policies within your district.

### Level 3: Minimize Purchases

#### Forecast Needs and Make Purchases Based on Enrollment and Inventory

Once you have a firm handle on the textbooks you already have in place in the district and your obligations are tracked and managed each school year, you can focus on ensuring that your purchases are managed as well. In most districts, the spring season usually includes planning for textbook needs for the following fall season.

Each year you may have a new textbook adoption to plan for, and you may need to plan for replacing textbooks and consumable items. All requirements for new instructional materials should be based on an analysis of inventory on-hand vs. projected enrollment. Some districts use the highest peak enrollment from the prior school year to anticipate needs for the following year. Other districts will utilize anticipated schedules and add a percentage factor to accommodate potential changes.

#### Eliminate Unnecessary Replacement Book Purchases

It's important to look at how excess/surplus inventory at each location could reduce replacement purchase costs—by being re-allocated to other locations. Even though you may incur costs to move inventory between locations, it's significantly less expensive in the long run than making unnecessary replacement book purchases.

Another potential area for cost-savings on replacement book purchases is to purchase pre-owned textbooks later in an adoption cycle. Each year you may also have textbooks that go out of adoption or other unneeded textbook resources. The district should have guidelines related to the disposal and sale of unneeded textbooks.

## **Forecast Your District's Textbook Needs**

Your textbook management system should provide for forecasting capabilities to plan for textbook needs at various levels. These levels may include planning for needs in relation to a specific title, a curriculum area, or specific grade levels at specific locations in the district. The focus of the functionality in this area of the system is to utilize the information on future needs and current inventory to support and control textbook purchases each year.

## **2.2 Key Best Practices for Implementation**

Once you have defined the goals you want to achieve, the schools involved and the timeframe for your first steps, you can get started on the real work of implementing your solution. Choosing and implementing a textbook management program will involve more steps than just installing the system and training users. To ensure the success of your project and ability to reach your improvement goals as quickly as possible, take a broader view of the tasks that go beyond installation of the system itself—to the people and process aspects of the improvement project.

The basic steps involved in implementing a textbook management solution include:

1. Staff your project team with district and school personnel.
2. Review and communicate your priorities and goals.
3. Review and develop policies and procedures.
4. Implement changes and measure results.



***Identifying the right people for the project team will steer its success.***

## **Staff Your Project Team**

Identify a district staff person that will serve as the functional lead for your textbook management improvement project team. Depending on the size of your district, this doesn't necessarily have to be a full-time position. You will want to appoint a project champion that has the authority and responsibility to accomplish the goals that you seek to achieve. You will also want to make sure you have project representation from district technology staff and any district warehouse function involved with textbook management.

Your district lead person will need to be supported by school-level staff. By assigning school level staff that have a good understanding of how textbooks are handled and stored at the school level, your project will be in capable hands. Ensure you have commitment from the principals for staff.

The tasks associated with developing data on your current textbook inventory and barcoding your textbooks will require staffing. Your vendor should be able to efficiently assist you in estimating your specific staffing needs. Districts can utilize available staff or enlist the support of volunteers or paid temporary staff to complete these tasks.

Specific staffing level requirements to support ongoing use of the system will vary from district to district. If you have a district with more than a few locations, you will want to consider identifying at least ongoing part-time district-level staff responsibilities for overseeing and managing textbook management throughout the district. District staff should be responsible for maintaining information on approved textbooks and the curriculum areas (which classes and what required textbooks) in the system.

At the school level, you will need to have staff that can support the periodic activities associated with textbook distribution and collection, and the processing of new book purchases. You will want to identify the person responsible for textbook management at the school level. In many districts, the vice principal or assistant principal at each location will fulfill this role. They are typically supported by office/clerical staff to complete the required tasks. During peak activity times of the school year, you may use temporary staff.

These activities typically do not require new positions or new staff, but more likely modifications to the part-time roles of individuals already involved with the management of textbooks.

### Review and Communicate Priorities and Goals

After you have determined the level of improvements you want to obtain, communicate the priorities and goals to your team and to the key individuals at each location involved. Everyone participating in the project must have a clear understanding of what needs to be accomplished—and the schedule for the project. Your goals should have specific measures, such as determining the textbook inventory baseline at each location, lost/damaged book costs, replacement book costs or percentage of textbooks distributed.

Your project team may want to meet with or interview other districts who have completed a similar project to leverage lessons learned. Your selected vendor should identify peer districts that are willing to share their experiences to help you to plan your efforts.

Some districts utilize staff meetings to present the project and discuss goals. Other districts also utilize the district website to communicate goals and ongoing status. The change management aspects of this type of project require ongoing communication to ensure the goals are well known and reinforced on a regular basis.

Your project team may identify key times during the school year where information will need to be shared (for example, before textbooks are distributed and before textbooks are collected).

### Review and Develop Policies and Procedures

Your team will need to review and understand the current district and school policies and processes related to the purchase, use, storage and disposal of textbook resources. You will need to determine policies for lost and damaged textbook files. If you have multiple locations in your district, pay close attention to policies and procedures related to the transfer or movement of textbooks from one location to another. Since your schools are likely to use the same textbooks at the same grade levels, this is one area that can provide significant cost savings. Have the team pull together any existing written policies and procedures that are available. The team should interview the key individuals (including clerical staff) that are involved with the management of textbooks.

After the team has developed a good understanding of current policies and procedures they should identify new or changed policies and procedures that may be needed to support the project goals. Recommendations should be reviewed, approved and communicated by district administration.

### Sample Policies include:

- ☐ District Ownership of Textbooks
- ☐ Transfer of Books Between Schools
- ☐ Transfer of Students Between Schools
- ☐ Annual Physical Inventory of Textbooks
- ☐ Disposal/Sale of Textbooks
- ☐ Guidelines for Purchasing Textbooks (New Adoptions and Replacement Books)
- ☐ Textbook Use Policy (Classroom and Home Use)
- ☐ Approved Textbook Title List
- ☐ Textbook Storage and Security
- ☐ District Fees/Fines for Lost and Damaged Books
- ☐ Student/Teacher Accountability Statements/ Policies

### Implement Changes and Measure Results

Your project team will work with your vendor to develop a project schedule for implementation. The project schedule will involve steps related to the installation of the new system, setup and configuration of locations in the system, entry and/or conversion of textbook data, training of users and the key activities to support the project throughout the school year.

The team will also need to take measures at the appropriate times to determine the impact of your improvement efforts. These measures should be captured and communicated each year. In some districts, measures related to textbook management are utilized as part of the performance appraisal process for certain key staff.

### 3. What Should I Expect From the Vendor?

Choose a partner that has a proven track record in helping K-12 districts manage their educational resources. Your partner needs to be able to offer a solution and implementation support that meets and exceeds the needs for your district. The partner should provide exceptional project planning, implementation assistance and follow-up maintenance and support capabilities that ensure the ongoing success of your textbook management improvement efforts.

The system needs to support both the district and school level functional needs associated with textbook management in a single easy-to-use and easy-to-access textbook management solution. The vendor should provide a solution that supports the

specific needs associated with managing textbooks. This solution should also leverage and support integration with other systems that are in place to manage other educational resources (e.g. library resources or fixed/portable assets that are used to support your student achievement goals).

The vendor should be able to offer services that help to review your existing policies and procedures, and offer best practices from other districts. Plus, it should have a broad enough installation base for your team to consult directly with peer districts on lessons learned to expedite your own textbook management improvement goals.

### 10 Questions to Ask When Considering a Textbook Management System

There are several technology areas to consider as you evaluate textbook management systems. Your district technology staff will need to ensure that the system you select will meet and exceed your district technology requirements.

1. How will the system integrate with your current student information system to take advantage of current demographic and scheduling data and reduce data entry?
2. Does the system support the Schools Interoperability Framework (SIF) specification to provide easy integration with current systems?
3. What support does the system have for integrating with cash management systems to report and record the payment of outstanding student/parent obligations?
4. How does the system support specialized access to functionality and data based on the role of the district and school user?
5. How does the system support integration with library management and asset management systems to ensure complete management of all educational resources with minimum technology requirements?
6. How does the system integrate with the existing district technology infrastructure (network architecture, security requirements, workstation requirements) to minimize new requirements and

ensure an easy-to-support solution for district technology staff?

7. Can the system be supported in a hosted (Software as a Service) environment to minimize district and school technology support requirements?
8. What steps does the vendor take to ensure the system is robust and reliable to meet the critical workload requirements associated with the management of the high volume of textbooks in a K-12 school district?
9. What's the track record of the vendor in providing technical support and updates to the system over the life of the solution?
10. What peripheral hardware (scanners and wireless hand-held devices) is available to provide quick and easy workflow, and support off-line usage?

### 4. Getting Started

Implementing this process should be efficient and uncomplicated for your district. Follett Software's Destiny Textbook Manager™ solution provides for unique technology benefits in each of the areas outlined above. Your Follett Software team can review how our solution is proven to meet and exceed the rigorous goals of leading K-12 districts. They can help you outline a project that achieves your district management improvement goals.

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*Textbook Manager*

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