



COMPANION TOOL TO ACCOMPANY THE INSTRUCTIONAL MATERIALS RUBRIC: A user's guide for reviewers and facilitators

Introduction

The purpose of this companion tool is to provide stakeholders using the *Rubric for Evaluating Reading/Language Arts Instructional Materials for Kindergarten to Grade 5* (Foorman, Smith, & Kosanovich, 2017) with an easy way to collect and compare reviewer ratings. The kindergarten to grade 5 rubric is divided into two sections, one for grades K-2 and one for grades 3-5. Using both the rubric and the companion tool will help educator committees conducting instructional materials reviews to make fully informed, evidence-based selections.

The companion tool includes two sets of Excel spreadsheets, one set for reviewing materials using the grades K-2 section of the rubric, and one set for reviewing materials using the grades 3-5 section of the rubric. Each set of Excel spreadsheets contains one spreadsheet for reviewers to record their ratings and one for facilitators to compile and compare reviewer ratings. The reviewer spreadsheet looks identical to the released rubric (that can be found at the following link: <https://ies.ed.gov/ncee/edlabs/projects/project.asp?projectID=4506>) and includes drop-down menus for reviewers to record their rating for each item on the rubric.

The facilitator spreadsheet is used to compile ratings from reviewer spreadsheets (detailed instructions are provided below) and highlights, in red, discrepancies among reviewers to aid facilitators in quickly identifying items for discussion. This will eliminate the need for facilitators to spend time sifting through reviews by hand to identify discrepancies. The facilitator spreadsheet also includes a section summarizing the percentage of agreement among the reviewers, the average score among the reviewers, and the average percent of items that met criteria (that is, rated 3 or above) for each content area subsection within the grades K-2 and grades 3-5 sections of the rubric.

Reviewer spreadsheets

This section provides information about the role of the reviewer and provides guidance on differentiating scores on the rating scale. The information provided is applicable to the grades K-2 and grades 3-5 sections of the rubric.

The role of the reviewers is to evaluate how well the instructional materials being considered meet instructional criteria for teaching reading/language arts content in the areas of foundational reading skills, reading comprehension for literary and informational text, writing development, speaking and listening skills, and language development¹ (referred to in this document as content area subsections). Reviewers will use a 1 to 5 rating scale to evaluate the instructional materials. It is important that reviewers have a common understanding of what each rating on the scale means to ensure that all reviewers are rating the instructional materials in the same way. Below are guidelines for differentiating scores on the rating scale that reviewers and facilitators should discuss prior to using the rubric to evaluate any instructional materials.

Differentiating scores on the rating scale

The five point rating scale used in the instructional materials rubric range from a score of 1, meaning that the indicator was not met, to a 5 which reflects the indicator was completely met. While most of the time it may be relatively clear if an indicator is not met at all (1), it is sometimes difficult to determine if an indicator is partially met (2), adequately met (3), substantially met, (4), or completely met (5).

Reviewers should select a rating of 1, indicating the criterion was not met, if the instructional materials do not address the indicator at all. Reviewers should select a rating of 2, indicating the criterion was partially met, if the instructional materials address only part of the criteria of the indicator or if an attempt is made to meet the criteria but at times the materials fail to do so. Reviewers should select a rating of 3, indicating the criterion was adequately met, if the materials address each aspect of the indicator but do not go above and beyond the criteria by providing additional information/guidance, examples, or opportunities for practice. Reviewers should select a rating of 4, indicating the criterion was substantially met, if the materials go beyond simply meeting the indicator by supplying more than one text, activity, example, or by providing additional guidance, practice opportunities, etc. Reviewers should select a rating of 5, indicating the criterion was completely met, if the materials provide numerous texts, activities, examples, exceptionally explicit and thorough guidance, multiple practice opportunities, or if the materials take the students steps beyond the indicator itself. Table 1 provides example rationales for rating a subset of items from the grades K-2 and grades 3-5 sections of the rubric.

¹ The references in brackets following each criterion in the rubric reflect Institute of Education Sciences practice guide citations that provide the research base for the criterion and validate its importance. See page 5 of Foorman, Smith, and Kosanovich (2017) for specific information regarding the research supporting the development of the rubric.

Table 1. Examples of ratings and comments in the rubric

Item from rubric	Rating	Example rationale for rating
Grades K-2 component		
1.1 Materials include guidance to provide small group, differentiated instruction to students struggling with reading development.	1 The criterion was not met	Materials do not provide a way for teachers to collect and use data to inform instruction and do not provide activities for small group differentiated instruction for students struggling with reading development.
	2 The criterion was partially met	Materials provide tools for teachers to collect data, but it is unclear how this data should be used to inform and provide small group differentiated instruction, or, it is clear how data should be collected and used to inform instruction, but an insufficient number of activities are provided for the teacher to provide instruction that is differentiated for students struggling with reading development.
	3 The criterion was adequately met	Materials provide tools for teachers to collect and use data to inform small group differentiated instruction and a sufficient number of activities are provided so the teacher can conduct small group, differentiated instruction with students struggling with reading development.
	4 The criterion was substantially met	Materials provide tools for teachers to collect data, include guidance on interpretation of the data collected to inform instruction, and provide a wide variety of activities and strategies that teachers can use to provide differentiate instruction for students struggling with reading development.
	5 The criterion was completely met	Materials provide tools for teachers to collect data, include explicit guidance on interpretation of the data collected to inform instruction, and provide a wide variety of activities and strategies targeted to the individual needs of students struggling with reading development so that the teacher may provide small group, differentiated instruction. The materials include activities for English learners.
1.3 Instruction follows a progression to develop phonological awareness (for example, syllables, rhyming, alliteration, onset, and rime).	1 The criterion was not met	The materials do not seem to follow a progression to develop phonological awareness.

Item from rubric	Rating	Example rationale for rating
	2 The criterion was partially met	The materials seem to follow a progression, but there are few instructional routines and activities to support the progression to develop phonological awareness, or, the progression lapses, or, it is unclear what instructional routines and activities should be utilized in instruction to provide support the progression to develop phonological awareness.
	3 The criterion was adequately met	The materials follow a clear progression to develop phonological awareness (for example, syllables, rhyming, alliteration, onset, and rime) and contain instructional routines and activities to support this progression.
	4 The criterion was substantially met	The materials follow an explicit and clear progression to develop phonological awareness (for example, syllables, rhyming, alliteration, onset, and rime) and contain a number of instructional routines and activities to support this progression.
	5 The criterion was completely met	The materials follow a clear, explicit, and systematic progression to develop phonological awareness (for example, syllables, rhyming, alliteration, onset, and rime) and contain an abundance of instructional routines and activities to support this progression.

Grades 3-5 component

2.5 Specific texts are included in materials for teaching various text structures (for example, sequence, comparison, contrast, and cause/effect) to support comprehension and careful reading of narrative and informational text.	1 The criterion was not met	The materials do not include specific texts for teaching various text structures to support comprehension and careful reading of narrative and informational text.
	2 The criterion was partially met	The materials contain specific texts for teaching some text structures (for example, sequence, comparison, contrast, and cause/effect) to support comprehension and careful reading of narrative and informational text; however, only a few texts are provided or a limited number of text structures are taught.

Item from rubric	Rating	Example rationale for rating
	3 The criterion was adequately met	The materials contain at least one text for teaching each text structure (for example, sequence, comparison, contrast, and cause/effect) to support comprehension and careful reading of narrative and informational text.
	4 The criterion was substantially met	The materials contain more than one text for teaching each text structure (for example, sequence, comparison, contrast, and cause/effect) to support comprehension and careful reading of narrative and informational text.
	5 The criterion was completely met	The materials provide numerous texts for teaching each text structure (for example, sequence, comparison, contrast, and cause/effect) to support comprehension and careful reading of narrative informational text. Text structure is highlighted and revisited throughout the materials to support comprehension.
2.6 Materials contain questions and tasks that require students to use text-based evidence (including making inferences).	1 The criterion was not met	Materials do not contain questions and tasks that require students to use text-based evidence.
	2 The criterion was partially met	Materials contain questions or tasks related to the text, but it is unclear that these would require students to use text-based evidence to respond.
	3 The criterion was adequately met	Materials contain some questions and tasks that require students to use text-based evidence (including making inferences).
	4 The criterion was substantially met	Materials contain several questions and tasks that require students to use text-based evidence to provide thoughtful responses (including making inferences).
	5 The criterion was completely met	Materials contain numerous simple and complex questions and tasks that require students to use text-based evidence to provide thoughtful and engaging responses (including making inferences). Techniques for drafting, elaborating, and revising responses are also included in the materials.

The next two sections provide instructions for completing the *General information* and *Rating the instructional materials* sections of the first three green tabs of materials (M) in the reviewer spreadsheet (denoted by “M1-,” “M2-,” and “M3-”). The green tabs in the reviewer spreadsheet will be used by reviewers to review up to three sets of materials. The red tabs that include

“aggregated” in the name are to be used only by the facilitator and will not be discussed here. The name of the first three tabs is determined by the information the reviewer provides in the *name of materials* and the *intended grade level(s)* fields in the *General information* section of each of those tabs. For example, if the reviewer is compiling ratings for the “Reading Is Fun” curriculum intended for use with grade 1 students, the name of the tab would automatically read “M1-Reading Is Fun Grade 1” after the reviewer entered this information in the corresponding fields in the *General information* section.

General information

The top section of each tab provides a space for the reviewer to record general information to document the date of the review, the reviewer, the name of the materials being reviewed, the grade level(s) the materials are intended for, and the type of materials being reviewed. Specific directions for completing each item in the *General information* section is provided below.

- **Date of review.** (Cell C2)
Enter the date the review was started.
- **Reviewer Name/ID.** (Cell C3)
Enter your name or identification (ID) number if asked to complete your review anonymously.
- **Name of materials.** (Cell C4)
Indicate the name of the instructional materials being reviewed. The length of this cell is restricted to only allow a maximum of 15 characters (including spaces and symbols) so the name of the tab can accommodate the intended grade level field as well. An error message will appear if more than 15 characters is entered into this field.

- **Intended grade level(s).** (Cell C5)

From the drop-down menu (“Kindergarten/Grade 1/Grade 2/K & Grade 1/Grades 1 & 2/K-Grade 2” or “Grade 3/Grade 4/Grade 5/Grades 3 & 4/Grades 4 & 5/Grades 3-5” depending on the rubric you are using), select the grade level or levels that are being considered when reviewing the instructional materials. For example, if you are only reviewing the kindergarten materials included in the instructional materials indicated in Cell C4, you should select “Kindergarten” from the drop-down menu.

- **Materials type.** (Cell C6)

From the drop-down menu (“Comprehensive Core/Supplemental Intervention/Comprehensive Intervention”), select “Comprehensive Core” if the type of instructional materials being reviewed are intended for use by all students in the class as core instruction. Select “Supplemental Intervention” if the instructional materials being reviewed are intended to go beyond the comprehensive core program to strengthen the initial instruction and provide additional practice to all students. Select “Comprehensive Intervention” if the instructional materials being reviewed are intended to be provided only to students who are lagging behind their classmates in the development of critical reading skills.

Rating the instructional materials

This section of each tab is where the reviewer will rate and provide supporting information for each item on the rubric.

- **Rating each rubric item.** (Column G)

Select a rating for each rubric item from the drop-down menu (“1/2/3/4/5”).

- **Support your rating.**

Reviewers should provide information to support the selected rating in the row that appears just below the “Support your rating” row for each item. Reviewers are encouraged to provide supporting information for two important reasons: (1) it provides information to the facilitator about why reviewers disagree on the rating of an item, and (2) it provides justification and enriches discussions centered on choosing one set of materials over another. To ensure that the facilitator is able to accurately compile reviewer ratings, make sure that all items applicable to the materials being reviewed have been rated.

Reviewers that wish to create a line break within the support your rating cell can use **Alt + Enter** to start a new line of text.

Facilitator spreadsheets

This section provides information about the role of the facilitator and is applicable to the K-2 and grades 3-5 sections of the rubric. The role of the facilitator is to recruit reviewers, orient reviewers to using the rubric and rating scale consistently following guidelines provided in the section describing the reviewer spreadsheets above, compile reviewer ratings, calculate average ratings across reviewers for reviewed materials, identify points of discussion (this will typically be centered on discrepancies among reviewers), and facilitate meetings among reviewers to discuss ratings and determine which materials to select.

The facilitator spreadsheet is able to compile ratings for up to 10 reviewers and contains three identical tabs to collect ratings of up to three instructional materials. The name of each tab is automatically determined by information provided by the facilitator in the *name of materials* and the *intended grade level(s)* fields in the *General information* section of each tab. For example, if the facilitator is compiling ratings for the “Reading Is Fun” curriculum intended for use with grade 1 students, the name of the tab would read “M1-Reading Is Fun Grade 1” after the facilitator entered this information in the *General information* section.

It is important for the facilitator to know that the reviewer spreadsheet is able to accommodate reviews for up to three sets of materials. Each review conducted by the reviewer will be represented on two tabs. One tab, which follows the same naming convention as the tabs in the facilitator spreadsheet, is used by the reviewer to rate the materials. The second tab, which includes “aggregated” in the name, reports the data in a format that aids the facilitator in compiling ratings across reviewers.

The next two sections provide instructions on completing the *General information* and *Compiling reviewer ratings* sections of the tabs found in the facilitator spreadsheet. The instructions are applicable to the K-2 and grades 3-5 sections of the rubric.

Facilitators will need access to the reviewers’ spreadsheets in order to transfer ratings to the facilitator spreadsheet. Therefore, it is important that the facilitator create a naming convention for files that reviewers follow when saving the reviewer spreadsheets. For example, the naming convention could require that file names include the reviewer’s name, an abbreviation for the name of the materials being reviewed, the grade level(s) the review focused on, and the date of the review. Using a file naming convention will allow facilitators to quickly identify important information about the data that is included within the file.

General information

- **Date reviews compiled.** (Cell B4)
Enter the date that data from reviewers were compiled.
- **Name of materials.** (Cell B5)
Indicate the name of the instructional materials being reviewed. The length of this cell is restricted to only allow a maximum of 15 characters (including spaces and symbols) so the name of the tab can accommodate the intended grade level field as well. An error message will appear if more than 15 characters is entered into this field.
- **Intended grade level(s).** (Cell B6)
From the drop-down menu (“Kindergarten/Grade 1/Grade 2/K & Grade 1/Grades 1 & 2/K-Grade 2” or “Grade 3/Grade 4/Grade 5/Grades 3 & 4/Grades 4 & 5/Grades 3-5” depending on the rubric you are using), select the grade level(s) being considered when reviewing the instructional materials. For example, if you are only reviewing the kindergarten materials included in the instructional materials indicated in Cell B4, you should select “Kindergarten” from the drop-down menu.
- **Materials type.** (Cell B7)
From the drop-down menu (“Comprehensive Core/Supplemental Intervention/Comprehensive Intervention”), select “Comprehensive Core” if the type of instructional materials being reviewed are intended for use by all students in the class as core instruction. Select “Supplemental Intervention” if the instructional materials being reviewed are intended to go beyond the comprehensive core program to strengthen the initial instruction and provide additional practice to all students. Select “Comprehensive Intervention” if the instructional materials being reviewed are intended to be provided only to students who are lagging behind their classmates in the development of critical reading skills.

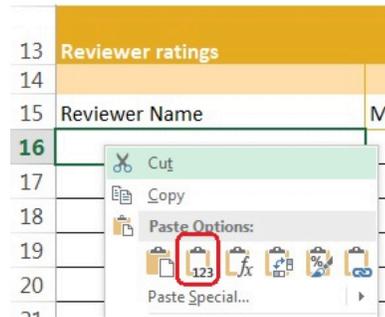
Compiling reviewer ratings

First, the facilitator will need to copy and paste, from the reviewer spreadsheet, the reviewer ratings from the red tabs that include “aggregated” in the name to one of Rows 16-26 in the facilitator spreadsheet using the following steps:

1. In the reviewer spreadsheet, right click on Row 4 in the red tab that includes “aggregated” in the name that corresponds to the set of materials you are compiling reviewer information from.
2. Select “copy” on the menu that appears.

The width of the supporting information fields for each item have been restricted to make the spreadsheet easier to read. In doing so, the facilitator may not be able to read all of the supporting information in the cell. However, if the facilitator selects the cell that includes the supporting information of interest, the formula bar located above the column headers will display all of the supporting information in the cell. If the reviewer entered no supporting information, a ‘0’ will be displayed for the corresponding cell.

- Open the facilitator spreadsheet and right click on Cell A16 (when transferring subsequent reviewer ratings, select any of Cells A17-A26) on any of the three tabs.
- Select “Values (V)” under “paste options” on the menu that appears². The icon appears as a clipboard with the numbers “123” in the bottom right hand corner (circled in red in the screenshot to the right). If you hover the cursor over the icons under “paste options,” you will see “Values (V).”



- Repeat these steps for each reviewer.

After the facilitator has completed steps 1-4 for each reviewer, the facilitator will need to specify whether or not there was agreement among the reviewers on the rating for each item by entering “Yes” or “No” for each item on Row 28. If the facilitator enters “no” the cell color will change to red to indicate a discrepancy among the reviewers that could be discussed further with the reviewers.

Summary scores

The *summary scores* section of the facilitator spreadsheet calculates several important pieces of information for each content area subsection included in the rubric based on the compiled reviewer ratings.

- Percent agreement among reviewers.** (Cells B35-B39)
 Percent agreement among reviewers represents an index of reliability. Reliability of at least 80 percent is considered sufficient enough to conclude that the reviewers shared a common understanding of the rating scale and used it similarly when rating items in a particular content area subsection (the cell color will change to green if the percent agreement among reviewers is at least 80 percent; Landis & Koch, 1977). If reviewers do not agree at least 80 percent of the time, facilitators should revisit the *differentiating scores on the rating scale* section of this document with reviewers to ensure that they all understand how to similarly apply the rating scale to the items on the rubric.
- Average score among reviewers.** (Cells D35-D39)
 The average score among reviewers is calculated by averaging the average rating for each reviewer within each content area subsection. The value for this index ranges from 1 to 5 with a score of 3 or greater indicating that the reviewers rated the materials as adequately meeting the criteria within the content area subsection (the cell color will change to green if the average score among reviewers is 3.00 or greater).

² Data entered directly into the facilitator spreadsheet will not be accurately represented in the summary score calculations. If a reviewer rating needs to be changed, the change will need to be made in the reviewer spreadsheet and the facilitator will need to start over with step 1.

- **Average percent of criteria met.** (Cells F35-F39)

The average percent of criteria met is calculated by averaging, across reviewers, the percent of items rated 3 or above within content area subsection by each reviewer. The cell color will change to green if at least 80 percent of the items in a content area subsection were rated as being at least adequately met. This information is important to consider in addition to the average score among reviewers because a high rating on one or two items within a content area subsection can inflate the average score among reviewers. This could lead reviewers and facilitators to believe that the materials adequately met the criteria within a content area subsection when the majority of the criteria in that area were not adequately met.

- **Interpreting these scores.** (Cells H35-H39)

The last column of information in the *Summary scores* section provides an interpretation that considers the values estimated for all three summary scores. For example, if the reviewers agreed 85 percent of the time, the average rating among reviewers was 3.50, and the average percent of items that met criteria was 65 percent, the interpretation provided would be “There is consensus among reviewers that the average rating for this subsection exceeded 3.0. However, less than 80 percent of the items adequately met criteria.” If, for example, the reviewers agreed only 60 percent of the time, the average rating among reviewers was 3.50, and 85 percent of the items met criteria, the interpretation provided would be “There is less than adequate consensus among reviewers even though the majority of the items within this subsection met criteria and the average rating exceeded 3.0. Facilitators should ensure that all reviewers are using the rating scale similarly.” Interpretations that contain the statement “Facilitators should ensure that all reviewers are using the rating scale similarly” should prompt the facilitator to revisit the *differentiating scores on the rating scale* section of this document with reviewers to ensure that they all understand how to similarly apply the rating scale to the items on the rubric.

Once the review process is complete, the facilitator may share and discuss the results with school, district, or state leaders who are requesting the results of the instructional materials review.

References

- Foorman, B. R., Smith, K. G., & Kosanovich, M. L. (2017). *Rubric for evaluating reading/language arts instructional materials for kindergarten to grade 5* (REL 2017-219). Washington, DC: U.S. Department of Education, Institute of Education Sciences, National Center for Education Evaluation and Regional Assistance, Regional Educational Laboratory Southeast. Retrieved from <http://ies.ed.gov/ncee/edlabs>.
- Landis, J. R., & Koch, G. G. (1977). The measurement of observer agreement for categorical data. *Biometrics*, 33(1), 159-174. doi: 10.2307/2529310

