

**Research on the Textbook Selection Process in the United
States of America**

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Abstract

The purpose of this article was to review published research literature about procedures used to select textbooks in the USA. The contents of books, collected works, reports and journal articles were analysed, and summaries of the contents were then organised chronologically to present a commentary on this topic. The results showed that procedures for selecting textbooks arose in the states in the late nineteenth century. By the early twentieth century, a balance between the numbers of states using state-level or local-level adoption procedures had been established, and a geographic pattern of north-eastern and mid-western states using local-level adoption and south-eastern, southern and western states using state-level adoption had emerged. Although early studies researching this phenomenon were limited to tabulating various provisions in selection policies, more recent studies have identified important differences between groups operating within these two types. Research examining the intent of state-level adoption has identified that its practice is most closely associated with controlling the cost of textbooks. Other research suggests that populous state-level adoption states influence the content of textbooks used across the USA. Research examining this phenomenon at the local level has identified complexity and diversity among selection procedures, but failed to identify a typical pattern from these data. Research comparing the differences and effects between local-level selection procedures in state-level and local-level adoption states has identified that the only significant effect is related to the cost of textbooks.

Key-words

Educational policy, Textbook content, Textbook selection, Textbook standards, Textbooks

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At the same time as the publishing industry was developing in the USA, the states enacted legislation controlling the adoption of textbooks and the provision of free textbooks. Legislation standardising procedures for adopting textbooks arose during the mid-nineteenth century in each state in response to the development of graded organisation requiring uniform textbooks for formal schooling in classes. Initially, uniformity was practised at the local level through laws requiring each local school board to adopt a list of textbooks, which parents were required to supply for a given period of time. The provision of free textbooks to students in public schools was first mandated in Philadelphia in 1818, and extended to the state level when Massachusetts became the first state to enact legislation in 1884. Instances of laws extending the adoption of textbooks and mandating the provision of free textbooks to the state level increased during the late nineteenth century and early twentieth century, but at different rates. The increase was greater for legislation affecting the adoption of textbooks, which was characterised by two main attributes. First, extension tended to move from the local level to the county level, and finally to the state level, although there were a few cases of states abandoning centralised procedures in favour of local-level adoption. Second, a pattern showing relatively equal and constant balance between north-eastern and mid-western states using local-level adoption procedures, and south-eastern, southern and western states applying state-level adoption procedures, became established by the beginning of the twentieth century. On the other hand, a different pattern emerged with regard to legislation mandating the provision of free textbooks, which showed little relationship to the pattern of legislation referring to textbook adoptions. Generally, legislation mandating the provision of free textbooks was common in most northern, south-eastern, southern and north-western states, whilst legislation permitting the provision of free textbooks was confined to a few north-eastern, mid-western and south-western states.

Tulley & Farr (1990) argued that the search for explanations about the evidence for textbook adoption policies should take into account the simultaneous development of the movement to provide free textbooks. Although the free textbook movement and textbook adoption policies evolved independently, the arguments in favour of free textbooks supported the development of state and local textbook adoption policies. Proponents of free textbooks argued that their provision should accompany compulsory education, textbooks could be replaced when necessary without placing undue financial burden on parents, the possibility for volume purchases of textbooks lowered costs, and free textbook legislation would increase curricular uniformity. Although different patterns emerged over time between these two forms of textbook legislation, the significance of the pattern of legislation affecting the adoption of textbooks is usually explained as reflecting regional traditions and styles of governance that have been extended to education. Wong & Loveless (1991) concluded that state-level adoption procedures arose from a regional distrust of eastern publishing houses, a desire to ensure adequate supplies of textbooks, and a political environment supporting state-wide uniformity in education systems. More

specifically, Apple (1991) argued that state-level adoption procedures arose in the southern states in the late nineteenth century because teachers were perceived to be incompetent and lacked capacity to select suitable textbooks, and publishers were perceived to be greedy and corrupt. Strong, centralised bureaucracies arose in the southern states during the late 1890s and early 1900s to regulate the activities of business corporations, protect weaker elements of the community, provide mechanisms for new groups to participate, and adjust group differences. Reformers, serving the conservative and moderate vested interests of these bureaucracies, promoted the view that disinterested experts, operating within the public arena, afforded the best opportunity for promoting the general interest. These attitudes led to the formation of elaborate procedures for selecting textbooks as a means of regulating state education systems.

In the commentary to a bibliography of research literature on textbooks, Woodward, Elliott & Nagel (1988) concluded that the large quantity of research on selecting materials, covering a multitude of discrete and overlapping topics, reflects the national concern in the USA to determine a valid selection process. This body of research aims at identifying particular roles in the selection process as crucial, employing particular techniques within the selection process, addressing curriculum considerations as the first priorities, and criticising cost-cutting deals between publishing companies and school districts. In this article, however, coverage is limited to reviewing significant research literature relating to five aspects referring to selection procedures used in the states. First, a series of research studies, analysing legislation and policies governing the selection of textbooks in the states, which has been facilitated by the existence of a basic structure of adoption procedures since well before 1900, is analysed. Second, research into the intents of state-level adoption, arising from the ongoing debate over the advantages and disadvantages of state-level adoption, forms an important topic for review. Third, another dimension of research focusing on ascertaining the influence that populous, state-level adoption states have on the content of materials, arising from publishers coordinating the publication of new materials to the adoption cycles of these states in an attempt to increase sales and restrict competition, is reviewed. Fourth, large-scale research studies investigating the lack of uniformity among local-level selection procedures in the states are analysed. Fifth, a research study comparing the outcomes of local-level selection procedures in state-level and local-level adoption states is reviewed.

The purpose of this article is to review published research literature on key factors controlling the selection of textbooks in the USA. Although acknowledging the conclusion reached by Woodward, Elliott & Nagel (1988) that the selection of materials is reflected in a wide variety of research literature, the body of literature reviewed in this article focusing on five topics presents a comprehensive set of research findings available on procedures for selecting textbooks. Since this critical commentary presents a coherent picture concerning the interaction of these factors in the materials' marketplace, the review of research literature on this topic is likely to increase the reader's understanding about the complex interactions occurring between development, selection and use of textbooks.

Methodology

The first step in identifying research literature on textbook selection in the USA was to consult the bibliography published by Woodward, Elliott & Nagel (1988) which provided an annotated list of references. Tulley & Farr (1990) noted that the history of research on selection procedures used in the states has been continuous, but research on the issues of the intent and influence of state-level textbook adoption has been confined to more recent times. Therefore, the search for additional research literature was directed to two avenues. First, footnotes, endnotes and lists of references contained in research studies included in the review, as well as bibliographies, were scanned to identify other research studies, particularly those undertaken in earlier times. Second, searches of the Educational Resources Information Center (ERIC) database were made to update the references provided in the bibliography. Information obtained from citations identified from these searches covered books, collected works, reports and journal articles.

Content analysis method was applied to analyse these documents. Once copies of available documents were obtained from library collections, they were read and summaries prepared. These summaries were then organised chronologically, and incorporated into the following commentary. This commentary, which analysed the most significant literature published on this topic since the late 1920s, treated five key issues relating to textbook selection in the USA.

Results

Overview of Selection Procedures

Presenting the earliest detailed account, Tidwell (1928) analysed the textbook provisions in state legislative statutes, which were verified by surveying state education agencies. It was reported that state-level adoption was practised in 18 states between 1895 and 1897, 23 states between 1905 and 1907, 24 states between 1915 and 1917 and 25 states between 1925 and 1927. County boards of education adopted materials in nine states between 1895 and 1897, six states between 1905 and 1907, seven states between 1915 and 1917 and six states between 1925 and 1927. Local school boards adopted materials in 21 states between 1895 and 1897, 19 states between 1905 and 1907, 17 states between 1915 and 1917 and 17 states between 1925 and 1927. In the period between 1925 and 1927, state-level adoption at both the elementary and secondary levels was mandated in 16 states: Alabama; Delaware; Florida; Indiana; Kansas; Kentucky; Louisiana; Mississippi; North Carolina; Oklahoma; Oregon; South Carolina; Tennessee; Texas; Utah; and Virginia. Partial state-level adoption, restricted to the elementary level, was mandated in nine states: Arizona; Arkansas; California; Georgia; Idaho; Montana; Nevada; New Mexico; and West Virginia. Adoption by county boards at both the elementary and secondary levels was mandated in Iowa, Maryland, Missouri, South Dakota and Washington, but restricted to the elementary level in Wisconsin. Colorado, Connecticut, Illinois, Maine, Massachusetts, Michigan, Minnesota, Nebraska, New Hampshire, New Jersey, New York, North Dakota, Ohio, Pennsylvania, Rhode Island, Vermont and Wyoming practised local-level adoption. Analysis of data indicated that the adopting authority in state-level

adoption states was usually vested in either the state board of education or specially appointed state textbook commissions. The members of these bodies were usually educators appointed to represent particular interest groups or geographical regions. With membership numbering from three to 13 persons, the terms of office varied from two years to an indefinite period. The general powers of adopting authorities were defined in laws relating to selection and adoption, and contracting publishers of adopted materials. Adoption lists generally specified a single textbook for each subject in each grade, although a few states adopted lists containing several materials. Seven local-level adoption states required school districts to select materials from open lists containing materials offered by publishers, who had complied with requirements to supply their products at prices that were no higher than those prevailing in other states. Although the length of adoption varied from three years to an indefinite period, most state-level adoption states operated adoption cycles. Various provisions governed other features in state-level adoption states. Supplementary materials were adopted in 21 states. The prices that publishers could charge for their materials were regulated in 38 states by limiting them to the lowest price prevailing in other states. The exchange of outdated for newly adopted materials was regulated in 30 states. School districts containing high urban concentrations were exempted from adoption requirements in 15 states. Adopting authorities in ten states were given powers to administer all aspects of the selection process. Publishers were required to submit deposits with their bids in 16 states. Successful publishers were required to submit bonds in 29 states in order to guarantee that they carried out their contracts. Publishers were prevented from restricting free competition in 18 states. Publishers were required to maintain depositories in 19 states, whilst depositories were assigned by the adopting authorities in the remaining state-level adoption states to each county. Laws relating to the supply of free textbooks, which were operated through loans' systems, existed in 43 states. These laws were mandated in 20 states with 14 of these states requiring textbooks to be supplied free to all grades, whilst the other six states limited the supply of free textbooks to the elementary level. Of the 23 states having permissive laws allowing school districts to elect the expenditure of funds to supply free textbooks, 20 states permitted textbooks to be supplied free to all grades. Provisions allowing for state-printed textbooks existed in five states, although state printing had only been practised in California and Kansas.

Coffey (1931) classified prevailing adoption procedures into five types. State textbook commissions or committees adopted textbooks in Alabama, Florida, Montana (for the elementary level only), Oklahoma, Tennessee, Texas and Utah (with urban areas excluded). State boards of education adopted textbooks in Arizona, Idaho, Indiana, Kansas, Louisiana, North Carolina (for the elementary level only), South Carolina and Virginia. State textbook commissions or state boards of education, in conjunction with local school boards, adopted textbooks in Arkansas, California, Connecticut, Georgia, Kentucky, Mississippi, Nevada, New Mexico, North Carolina, Oregon and West Virginia. County boards of education and local school boards adopted textbooks in Iowa, Georgia, Maryland, Missouri, North Carolina (for the secondary level only), South Dakota, Washington and Wisconsin. Local school boards adopted textbooks in Colorado, Delaware, Illinois, Maine, Massachusetts, Michigan, Minnesota, Nebraska, New Hampshire, New Jersey, New York, North Dakota, Ohio, Pennsylvania, Rhode Island, Vermont and Wyoming. Adopting authorities in state-level

adoption states were either elected or appointed, usually included the chief state school officer, and consisted of professional, non-professional and ex officio members. They generally adopted materials for five or six years through a written contract, required bonds from publishers, regulated prices, provided a distribution system with provision for depositories, and sometimes operated a state printing service. A similar situation prevailed in states using county boards of education and local school boards, but decision-making was diffused, and other provisions relating to the purchase and distribution of textbooks were less regulated in these states.

From an analysis of the textbook provisions in state legislative statutes, which was verified by surveying state education agencies, Lange (1941) examined the basis for adoption and the availability of free textbooks. Lange classified adoption procedures into four types. Florida, Indiana, Kansas, Kentucky, Louisiana, New Mexico, North Carolina, Oklahoma, South Carolina, Tennessee and Virginia authorised the state education agency to select and adopt materials, usually approving a single list for textbooks and a multiple list for supplementary materials. Alabama, Arizona, Arkansas, California, Georgia, Idaho, Mississippi, Montana, Nevada, Oregon, Texas, Utah and West Virginia used various combinations of state and district control to adopt materials. Of these states, Alabama, Idaho, Mississippi, Oregon, Utah and West Virginia exempted certain school districts from state adoptions, Georgia, Montana, Nevada and Texas exempted particular subjects from state adoptions, and secondary schools in Arizona, Arkansas, California, Idaho, Montana, Nevada and West Virginia selected materials from open lists of approved textbooks. Iowa, Maryland, Missouri, South Dakota, Washington and Wisconsin authorised county boards to adopt textbooks with provisions for independent selections by certain school districts. Colorado, Connecticut, Delaware, Illinois, Maine, Massachusetts, Michigan, Minnesota, Nebraska, New Hampshire, New Jersey, New York, North Dakota, Ohio, Pennsylvania, Rhode Island, Vermont and Wyoming authorised local school districts to adopt their own materials. Of these states, Delaware, Illinois, Michigan, Minnesota, Nebraska, North Dakota, Ohio and Wyoming imposed a measure of state control through the use of open lists. In the other ten states, mandatory provisions were not used to control adoptions at the school district level. Lange also reported that 30 states required free textbooks to be provided to all or some students, whilst 17 states permitted local school districts to provide free textbooks in their schools. Oklahoma was the only state without mandatory or permissive legislation for free textbooks. The source of funds in states mandating free textbooks was usually state or local, although funds came partly from both sources in some states. In states permitting free textbooks, the source of funds was the local school district. Lange estimated that approximately 65 percent of all students enrolled in public schools in the USA received free textbooks.

From an analysis of the textbook provisions in state legislative statutes, which was verified by surveying state education agencies, Burnett (1950) examined the basis for adoption, the types of adoption lists, availability of free textbooks, sources of funds for textbooks, and the membership of adopting authorities. The basis for adoption was divided between 24 states applying state-level adoption and the other 24 states applying local-level adoption. State-level adoption was applied in Florida, Georgia, Indiana, Kansas, Kentucky, Louisiana, Mississippi, New Mexico, North Carolina,

Oklahoma, South Carolina, Tennessee, Texas and Virginia. Urban areas were excluded from state-level adoption applied in Alabama, Delaware, Oregon, Utah and West Virginia. Partial state-level adoption was practised at the elementary level only in Arizona, Arkansas, California and Nevada. Partial state-level adoption was practised at the elementary level only with exclusion of urban areas in Idaho. County boards of education adopted materials in Iowa, Maryland, Missouri, South Dakota and Washington. Local school boards adopted materials in Colorado, Connecticut, Illinois, Maine, Massachusetts, Michigan, Minnesota, Montana, Nebraska, New Hampshire, New Jersey, New York, North Dakota, Ohio, Pennsylvania, Rhode Island, Vermont, Wisconsin and Wyoming. The types of adoption lists varied between eight state-level adoption states listing a single title and 16 state-level adoption states listing multiple titles for most subjects and grades, but only six state-level adoption states permitted local school boards to adopt from available materials for the secondary level. The availability of free textbooks was regulated by 34 states requiring free textbooks to be provided to all or some students, and 14 states permitting local school districts to provide free textbooks in their schools. The sources of funds for textbooks varied between seven states using state funds, one state using county funds, 14 states using district funds and 26 states using a combination of these sources for funding the purchase of textbooks. Adopting authorities were based in state boards of education in 15 state-level adoption states, and in state textbook commissions in nine state-level adoption states. State-level adopting authorities ranged in size from five to 13 members, who were generally appointed by the chief state school officer or the governor, and served from two to nine years. State textbook commissions contained a higher proportion of professional educators than state boards of education, and it was common for state-level adopting authorities to appoint subcommittees of professional educators to conduct preliminary reviews. In local-level adoption states, district school boards, consisting largely of citizens, usually were responsible for adopting textbooks. Burnett concluded that there was no sign of change in the balance between states applying state-level adoption or local-level adoption. During the previous three decades, the only change reported was the abandonment by Montana of state-level for local-level adoption in 1941. It was difficult to generalise other findings from the study, because of unique qualities prevailing in the various states.

Although Durrance (1952) classified the basis for adoption into five categories, the states of Connecticut, South Dakota and Wisconsin were omitted from any category, whilst Arkansas, California, Iowa, Oklahoma, Washington and West Virginia divided adoption between authorities and were included in two or three categories. State textbook commissions adopted textbooks in Arkansas, Florida, Indiana, Kentucky, Nevada, Oklahoma, Oregon, South Carolina, Tennessee, Utah and Virginia. State boards of education adopted textbooks in Alabama, Arizona, Arkansas, California, Delaware, Georgia, Idaho, Kansas, Louisiana, Mississippi, New Mexico, North Carolina, Texas, and West Virginia. County boards of education adopted textbooks in Iowa, Missouri, Nebraska, New York, and Washington. Local school boards adopted textbooks in California, Colorado, Illinois, Iowa, Maine, Michigan, Minnesota, Montana, New Hampshire, New Jersey, North Dakota, Ohio, Oklahoma, Pennsylvania, Vermont, Washington and West Virginia. Local electorates adopted textbooks in Arkansas, Maryland, Massachusetts, Rhode Island and Wyoming. A legal basis for the

adopting authority applied in most states, but in a few states it was semi-legal, non-legal, or ex officio. In those states with a legal basis, the governor or chief state school officer usually appointed the adopting authority. Adopting authorities were generally composed of a combination of professional and lay people, but some states had bodies composed of either group only. In some states, advisory bodies of professional educators assisted adopting authorities. Some state-level adoption states required private and parochial schools to use state-adopted materials, permitted teachers to use non-adopted materials, or required teachers to use approved reference materials. The sources of funds for providing free textbooks were state, local or individual, although the funds came partly from two or more sources in some states. Although most states provided state-adopted textbooks free, a number of states required students to purchase supplementary materials.

The Institute for Educational Development (1969) reported an extensive study of procedures used in the states to select materials. From an analysis of the textbook provisions in the legislative statutes of the 50 states, it was identified that from two to eight units at the state, county, district and local levels were involved in the selection process. State-level adoption states commonly used five units, whilst local-level adoption states usually used only three units. Whilst two-thirds of the important units in state-level adoption states were required to be composed totally or primarily of professional educators, only four local-level adoption states specified this requirement. State-level adoption states were most likely to have special-purpose textbook selection committees as highly involved units, whereas local-level adoption states rested legal authority for selection most frequently with general-purpose groups, elected locally. Furthermore, chief state school officers and state boards of education played significant roles in the selection process in state-level adoption states, but only performed general supervisory roles in local-level adoption states. County units were equally important in both state-level and local-level adoption states, but were only predominant in Maryland and South Dakota. There was a marked difference between the roles of local-level units in state-level and local-level adoption states. In the former, the most frequent role involved choosing from lists prepared by state-level units, purchasing and distributing materials, whilst selection was the most frequent role in the latter.

Specifications imposed in the textbook provisions of state legislative statutes were analysed in terms of time constraints, procedural constraints on publishers, and substantive constraints on content. It was found that state-level adoption states had longer time spans between adoptions, averaging five years. State-level adoption states usually had some form of procedural constraint on publishers, whereas 13 local-level adoption states did not specify any procedural constraint on publishers. However, similar proportions of both state-level and local-level adoption states specified substantive constraints on the content of materials. The specifications were also analysed in terms of six dimensions: whether the selection procedure showed high or low centralisation, high or low administrative complexity, high or low professionalism, more or less frequent selection, more or less restrictive or non-restrictive procedural constraints, and more or less restrictive or non-restrictive substantive constraints. The analysis revealed that there was a strong correlation between high centralisation and administrative complexity, but a weak correlation between high

centralisation and professionalism. Relationships also appeared to exist between high centralisation and less frequent selection, and low centralisation and lack of statutory specification of an adoption cycle. Moreover, state-level adoption states were evenly divided in terms of having restrictive or non-restrictive patterns of procedural constraints, whilst local-level adoption states fell more frequently into non-restrictive patterns. The relationship between non-restrictive substantive constraints was stronger for local-level adoption states than for state-level adoption states. When professionalism and administrative complexity were compared, there was a strong correlation between high administrative complexity and low professionalism. There appeared to be no clear relationship between high administrative complexity and patterns of procedural constraints, but low administrative complexity was related to less restrictive procedural constraints. A similar pattern of relationships to the latter emerged in a comparison of substantive constraints and administrative complexity.

Selection procedures of state-level and local-level adoption states were also classified into several categories. It was found that the textbook provisions in state legislative statutes of state-level adoption states differed according to the number and types of state-level units required to participate and the relative rigidity of state-level constraints. These differences were reflected in the length of the adoption cycle, the numbers of basic materials selected, the amount of freedom to select supplementary materials locally, and the numbers and types of exceptions provided for local flexibility. The differences between specifications in the textbook provisions of state legislative statutes of state-level adoption states allowed four categories to be defined. The rigid state-level adoption states of Louisiana, North Carolina, South Carolina, Texas and Virginia were characterised by adopting few materials, specifying more stringent enforcement procedures, and providing more comprehensive and detailed regulations for local selections. The moderately restrictive state-level adoption states of Alabama, Florida, Indiana, Mississippi, Oklahoma, Tennessee and West Virginia had relatively short adoption cycles, approved multiple adoptions, and provided for selection of supplementary materials locally. The flexible state-level adoption states of Alaska, Georgia, Kansas, Kentucky, Nevada, Oregon, Utah and Wyoming were characterised by considerable latitude in five aspects. Supplementary materials were selected locally, autonomy was provided to larger population centres, the numbers of adopted materials were not specified, adoption cycles were short, and greater freedom was provided for the addition of new materials outside adoption cycles. Arizona, Arkansas, California and New Mexico were termed partial adoption states, because they mandated state-level adoption for the elementary level only, which was generally rigorous, especially in the case of California. Five categories were determined from an examination of the textbook provisions in state legislative statutes of local-level adoption states. Delaware, Illinois, Michigan and Ohio required state-level listing of materials adopted locally, combined with specified adoption cycles. North Dakota and Rhode Island required state-level listing of materials adopted locally. Iowa, Maine, Maryland, Montana, New York, South Dakota and Washington specified adoption cycles. Minnesota, Missouri, New Jersey, Pennsylvania and Wisconsin specified the selection procedures to be followed in detail. Colorado, Connecticut, Hawaii, Idaho, Massachusetts, Nebraska, New Hampshire and Vermont were classified as *laissez-faire*, because they specified minimal state-level legal requirements.

The examination of state legislation was verified by a survey of state, county and district participants in the selection procedures used in ten states: California; Connecticut; Florida; Georgia; Indiana; Montana; North Carolina; Ohio; Texas; and Wisconsin. This sample of states represented eight of the nine selection patterns identified from the classification derived from the examination of textbook provisions in state legislative statutes. In addition, two states were added, one because it deviated from the general pattern geographically and the other because it was an important consumer of materials. Data were collected from 401 subjects by an interview schedule administered by project associates in each state. The findings indicated that selections were made in four ways. Individuals and groups of teachers selected materials in Wisconsin. Groups of teachers selected materials in California and Connecticut. Groups of teachers and administrators selected materials in Florida, Georgia, Indiana, Montana, Ohio and Texas. Groups of teachers and administrators or groups of administrators selected materials in North Carolina. Multi-stage procedures were used in all states, except for the multi-level procedure used in North Carolina. Subjects indicated almost complete freedom of choice applied in California, Connecticut, Florida, Montana, Ohio and Wisconsin with a wide range of choice applying in the four state-level adoption states of Georgia, Indiana, North Carolina and Texas. Relevance to the curriculum prevailed as the predominant selection criterion in all states, except North Carolina, with cost being the predominant decision criterion in most states. Subjects in most states cited teacher involvement as the most important strength of the selection procedure, but mentioned five main weaknesses. Time constraints existed in California, Connecticut, Florida and Montana. Limits on individual knowledge occurred in Connecticut, Indiana, Ohio and Wisconsin. Insufficiently specialised professional advice predominated in California and Texas. Insufficient information was available on products in Georgia and Ohio. The selection procedures were too centralised in Georgia and North Carolina.

The perceptions of publishers' representatives about the process for selecting materials were elicited in the study for four aspects: the locus of influence in each state; selection criteria; strategies and tactics of publishers; and constraints, strengths, weaknesses and trends in selection procedures. The sample consisted of 19 publishers' representatives, mainly sales managers and salespeople, from 15 different companies or organisations, who responded to a structured instrument and group interviews at informal meetings. Their views of the locus of influence in each state corresponded closely to the formal allocation of decision-making authority contained in textbook provisions in state legislative statutes. They viewed factors impinging on specifying relevant criteria to be whether print or non-print materials were being selected, whether a teacher or an administrator was making the selection, and whether selection was being made at the elementary or secondary level. They perceived effective marketing strategies to be important influences in the selection process. Although they believed the major constraints on the selection of materials were economic, they viewed the conservatism of many educators as being significant in restricting the selection of innovative materials. They believed the involvement of many kinds of professional educators at many points in the selection process to be its greatest strength.

The study concluded that selection procedures were on the whole decentralised, highly differentiated, and unsystematic. Patterns of selection did not differ greatly between state-level and local-level adoption states. The systematic differences that were observed seemed to be based on the size of the school district, whether it was located in an urban, suburban or rural setting, its social and economic characteristics, and the attitudes of school personnel, who were influential and involved in selecting materials. Local patterns for selecting different types of materials did not seem to differ, except in rigid state-level adoption states, where supplementary and non-print materials were not selected by the same procedures as textbooks. Planned, systematic intervention to change the prevailing procedures for selecting materials was perceived to be extremely difficult, because of their complexity, decentralised and unsystematic natures, and dependence on local variations.

Intents of State-Level Adoption

Tulley & Farr (1985) analysed the textbook provisions in the state legislative statutes of the 22 state-level adoption states to identify explicit statements or evidence of intent in state-level textbook adoption practices. The results revealed that there were no explicit statements of intent included in any of the statutes, but that there were similarities across nine features. The specification of these similarities in the statute of each state was classified according to nine categories. The analysis of the results indicated little evidence to support a hypothesis that the intent of state-level textbook adoption was to control curriculum, instruction or textbook quality, but some evidence to support a hypothesis that the intent of state-level textbook adoption was to control the marketing practices of publishing companies. This conclusion was based on the finding that 12 states empowered the adopting authority to prescribe the curriculum, 12 states specified selection criteria, and 11 states prescribed the number, set a range, or a maximum number of textbooks to be adopted. A more conspicuous finding pertained to control over instruction, since no provision referring to pedagogic approaches was found in the statutes. Similarly, no provision was contained in the statutes for identifying textbooks, which met standards of quality, although provisions were made for individuals whose abilities and experiences would enable them to make qualitative distinctions between textbooks. Provisions were made in the statutes of three states requiring the adopting authority to consist predominantly of educators, ten states requiring the adopting authority to provide subcommittees to assist the adopting authority and five states requiring the adopting authority to involve educators with subject area expertise. In contrast, evidence of the scope and volume of provisions relating to controlling the participation of publishing companies was found in nine types of provision emphasising control of textbook costs and contractual obligations between publishers and the state. The results suggested that the intent of state-level textbook adoption may be to control the marketing practices of publishing companies, but the intent was neither clearly defined nor explicitly stated in the statutes.

A presumption that the policy impact of state-level textbook adoption was speculative led Tulley (1985) to investigate its intents, because definitive research findings were lacking and reviews of professional literature and publications of state education agencies lacked insight into this issue.

Instead, improvements to selection and adoption policies were more likely to be soundly based, if the purpose of the study was to inquire into policy intent, efficacy and impact, and it was designed to test hypotheses. The textbook provisions in the state legislative statutes of the 22 state-level adoption states and related documents produced by state education agencies were analysed, administrators in these states, and publishers' representatives and members of local-level selection committees participating in the adoption procedure in Indiana were interviewed. The results from the analysis of data from all sources indicated that the practice of state-level adoption was based on nine intents. First, it ensured some degree of state wide curricular uniformity. Second, it ensured the selection of high quality materials. Third, it controlled the cost of materials, or kept the cost as low as possible. Fourth, it saved time and work for school districts. Fifth, it provided for public participation in the adoption process. Sixth, it provided structure and organisation for the selection and adoption process. Seventh, it ensured the periodic review and purchase of materials. Eighth, it controlled the marketing practices of the publishing industry. Ninth, it gave the state responsibility for potentially controversial materials. The results of the study led to three conclusions. First, the purpose of state-level adoption was most closely associated with controlling the cost of materials, guaranteeing curricular uniformity and ensuring high quality in materials. Second, the nine intents pertained in varying degrees to the purpose of state-level adoption in the 22 state-level adoption states. Third, greater insight into the intent, efficacy and impact of state-level adoption may be gained by examining adoption procedures in local-level adoption states.

Influence of State-Level Adoption States

The inordinate influence that populous state-level adoption states have on the content of textbooks arises from publishers coordinating development and publication of new textbooks to these states' adoption cycles in an attempt to increase sales. Such coordination leads publishers to submit textbooks at an early stage to give an opportunity for adoption, rejection, or approval, if specified changes are made. Although special editions are occasionally published to meet these states' requirements, usually altered textbooks are marketed across the USA. Although the overall impact of these compromises on content is difficult to assess, this phenomenon, often referred to as the 'California effect' or 'Texas effect', has been widely accepted in publishing and educational circles for many years, and examined in research literature dealing with a range of topics.

Crane (1975) reported evidence that revisions of textbooks to meet state-level adoption requirements in California were incorporated into editions marketed nationally. Crane argued that the advent of a multiple adoption list in California in 1974 required publishers to make changes to their materials to meet state-level adoption requirements, thereby incorporating such changes into publishers' national editions. Instances of how changes made by the Legal and Factual Analysis Committee, reflecting prevailing attitudes in California to ethnic minorities and women, influenced publishers' decisions, were cited as evidence. Bowler (1978) discussed ways publishers attempted to match the content of their textbooks to community needs and pressure groups in Texas, and how the content of reading materials marketed elsewhere was influenced by these demands. English (1980)

examined the significance of competing interest groups in influencing the selection and adoption of materials in populous state-level adoption states, arguing that state-level adoption procedures played a major role in homogenising and sterilising the content of textbooks. Moyer (1985) discussed how conservative pressure groups, represented by Mel and Norma Gabler, manipulated the state-level adoption procedure in Texas to influence the coverage of such topics as evolution and human sexuality in science textbooks marketed nationally. Schomburg (1986) discussed how the combination of a new curriculum enacted in 1982, state-level adoption, publishers' interests, conservative pressure groups and state board members affected the selection of textbooks in Texas, and ultimately influenced textbook content nationally. Sturm & Weiss (1988) challenged the view that the 'Texas effect' influenced the adoption of geography textbooks elsewhere by reviewing and comparing data on adoption lists for geography textbooks in all state-level adoption states, finding its influence was minimal. A comparison of the states' adoption lists showed that geography textbooks adopted in Texas in 1982 were not widely adopted elsewhere, but after a new curriculum was introduced, new geography textbooks adopted in 1983 were more typical of those adopted in other states. The variance in the results of this study from those reported in other commentaries was attributed to the less controversial nature of the content in geography and the relatively small market for geography textbooks.

Nature of Local-level Selection Procedures

From surveying school districts in all cities in the USA with populations between 25,000 and 250,000 people, Jensen (1931) reported data on responses elicited from 172 superintendents, representing 80.2 percent of the sample. Of all respondents, 76.7 percent reported that adopting authority was vested in the board of education, 4.1 percent reported that adopting authority was vested in a committee of the board, and 19.2 percent reported that adopting authority was vested in the superintendent. Of 161 respondents, 91.9 percent stated that the board of education acted on the recommendation of the superintendent, whilst 8.1 percent stated that the board of education acted on the recommendation of a committee of the board of education. Of 162 respondents, 68.5 percent stated that they examined textbooks personally, whilst 31.5 percent stated that they did not examine textbooks personally. Of 167 respondents, 93.4 percent stated that they relied on recommendations of selection committees, whilst 6.6 percent stated that they did not rely on recommendations of selection committees. Of 161 respondents, 91.9 percent reported that the superintendent appointed the selection committee. It was inferred from the responses of 117 superintendents that the typical membership of selection committees consisted of seven members comprising one-half of teachers, one quarter of principals and one-quarter of superintendents. Of 135 respondents, 1.5 percent believed selection committees should consist of one or two members, 25.9 percent cited three or four members, 45.2 percent cited five or six members, 17.8 percent cited seven or eight members and 9.6 percent cited from nine to 15 members. Of 159 respondents, 81.8 percent stated that publishers could make presentations to selection committees, 14.4 percent stated that publishers could not make presentations to selection committees, and 3.8 percent stated that publishers could make presentations to selection committees under certain circumstances. Of 111

respondents reporting that selection committees heard presentations from publishers, 51.8 percent stated that there were no restrictions on publishers' presentations and 49.2 percent stated that there were restrictions on publishers' presentations. Of 163 respondents, 89.0 percent stated that selection committees were appointed on a temporary basis, and 11.5 percent stated that selection committees were appointed on a permanent basis. Of 159 respondents, 96.9 percent used selection committee reports as recommendations, and 3.1 percent used selection committee reports as the final adoption. Of 154 respondents, who used selection committee reports as recommendations, 61.7 percent always accepted the recommendations. Of 155 respondents, 72.3 percent stated that selection committees operated outside school hours, whilst 27.7 percent stated that selection committees operated within school hours. Of 151 respondents, 78.1 percent stated that they provided guidelines for selection committees to operate, whilst 27.7 percent stated that they did not provide guidelines.

Kunder (1976) reported a study of local-level selection procedures used in a sample of 1,275 school districts across 33 states and the District of Columbia. The sample was selected on the basis of a classification of textbook adoption procedures applied in the study. Alabama, Arizona, Arkansas, Georgia, Idaho, Indiana, Kentucky, Louisiana, Mississippi, New Mexico, North Carolina, Oklahoma, Oregon, South Carolina, Tennessee, Texas and Utah used state-level adoption procedures. California and West Virginia used dual adoption procedures. Florida, Hawaii, Nevada and Virginia used state-level adoption procedures with local choice from state adopted lists. Alaska, Colorado, Connecticut, Delaware, District of Columbia, Illinois, Iowa, Kansas, Maine, Maryland, Massachusetts, Michigan, Minnesota, Missouri, Montana, Nebraska, New Hampshire, New Jersey, New York, North Dakota, Ohio, Pennsylvania, Rhode Island, South Dakota, Vermont, Washington, Wisconsin and Wyoming used local-level adoption procedures. School districts in the 17 states, classified as using state-level adoption procedures, were excluded from the sample. Responses were elicited from 414 school districts, representing 32.4 percent of the sample.

The results indicated that 72.7 percent of the school districts had developed policies for selecting basal materials, whilst 50.7 percent stated they had policies for selecting supplementary materials. The policies of 66.9 percent of the school districts contained statements about representing minority ethnic groups, 67.3 percent contained statements for identifying sex stereotypes, and 66.2 percent contained procedures for handling challenges. The incidence of challenges was identified with 26.3 percent of the school districts stating that there had been recent challenges to basal materials, and 21.5 percent stating that there had been recent challenges to supplementary materials.

Of the 306 school districts with selection committees, 84.6 percent reported having selection criteria, and 38.2 percent reported having procedures for verifying materials prior to their use. The organisation of selection committees varied among this group with 22.9 percent forming part of general curriculum committees, 72.2 percent operating independently, and 1.6 percent having both a separate selection committee and one that was part of the general curriculum committee. Of this group, 19.6 percent had one district-wide committee, 47.7 percent had separate district-wide

committees for elementary and secondary levels, 5.6 percent had committees based in separate school buildings, 13.7 percent had separate subject area or grade level committees, and 10.8 percent used a combination of these types. The functions of selection committees also varied. Of this group, 52.6 percent reviewed and recommended materials to another group or individual for adoption, 27.8 percent reviewed and selected materials subject to approval, 18.6 percent reviewed, selected and approved materials, and 1.5 percent had different functions at the elementary and secondary levels. Of the 246 school districts in which selection committees did not approve materials, responsibility for adoption rested with different groups. Local school boards were responsible for approval in 51.0 percent of cases. Superintendents were responsible in 4.6 percent of cases. Local school boards and superintendents were responsible in 2.9 percent of cases. Principals were responsible in 6.2 percent of cases. Teachers were responsible in 3.3 percent of cases. Principals and teachers were responsible in 5.9 percent of cases. Other combinations were responsible in 6.5 percent of cases. The basis for the composition of selection committees varied in the 306 school districts. Composition was specified by policy or statute in 48.7 percent, was not specified by policy or statute but the positions remained the same in 14.7 percent, and was not specified by policy or statute and varied with each election of committee members in 36.6 percent. Of the selection committees in the 306 school districts, 63.7 percent did not specify lengths of time that committee members may serve, whilst 35.3 percent did specify lengths of time that committee members may serve. In this latter group of 108 committees, 25.9 percent of members served for one year, 33.3 percent of members served for from two to three years, whilst 18.5 percent served until the task was completed. Selection committees in the 306 school districts were chosen in many ways, but four ways predominated with 17.0 percent being appointed by the superintendent, 16.7 percent being chosen by constituent groups, 10.1 percent being volunteers, and 9.2 percent being chosen by both the superintendent and constituent groups. Of the 306 school districts, 42.8 percent released administrators from other duties to serve on selection committees, and 51.3 percent released teachers from other duties to serve on selection committees. Of the committees in the 306 school districts, 87.6 percent provided opportunities for publishers to meet with committee members. Of the 414 school districts responding to the survey, 74.6 percent had negotiated agreements with teachers concerning participation on selection committees, but only 22.3 percent made provisions for teacher participation.

By surveying a proportionally stratified nationwide sample of 2,482 principals, 2,498 superintendents, 1,249 school librarians and 1,342 district-level library supervisors, Kamhi (1981) reported data elicited from 1,891 subjects on procedures for selecting materials, the extent to which materials were challenged, and the ways challenges were resolved. Textbook administrators in the 22 state-level adoption states were also interviewed.

Respondents indicated that selection of materials presented a complex pattern. School districts were reported by 50.4 percent to be responsible for selecting basal materials. School districts were reported by 72.7 percent to be responsible for selecting supplementary materials. State-adopted lists were reported by 28.3 percent to be used for selecting basal materials. State-adopted lists were reported by 5.6 percent to be used for selecting

supplementary materials. County-adopted lists were reported by 4.0 percent to be used for selecting basal materials. County-adopted lists were reported by 2.4 percent to be used for selecting supplementary materials. City-adopted lists were reported by 1.5 percent to be used for selecting basal materials. City-adopted lists were reported by 1.5 percent to be used for selecting supplementary materials. The selection of basal materials was reported by 2.6 percent to be done by different procedures at the elementary and secondary levels. The selection of supplementary materials was reported by 4.9 percent to be done by different procedures at the elementary and secondary levels. Respondents indicated that selection policies were developed and approved at six levels. Selection policies were reported by 6.9 percent to have been developed at the state level and by 6.3 percent to have been approved at the state level. Selection policies were reported by 9.3 percent to have been developed at the county level and by 9.7 percent to have been approved at the county level. Selection policies were reported by 3.8 percent to have been developed at the city level and by 3.6 percent to have been approved at the city level. Selection policies were reported by 55.3 percent to have been developed at the school district level and by 64.6 percent to have been approved at the school district level. Selection policies were reported by 13.1 percent to have been developed at the school building level and by 8.9 percent to have been approved at the school building level. Selection policies were reported by 10.1 percent to have been developed at the school department level and by 6.0 percent to have been approved at the school department level.

The principals and superintendents indicated that selection committees in their school districts performed several functions. Selection committees were reported by 32.1 percent to review and recommend materials, 48.3 percent to review and select materials, and 10.2 percent to review, select and adopt materials. They also indicated that particular groups were permitted to make presentations to selection committees in their school districts. Publishers' representatives were reported by 92.4 percent to make presentations to committee members. Special interest groups were reported by 57.8 percent to make their views known to committee members. Selection committees were reported by 59.8 percent to provide information to the community about controversial materials. They also indicated that selection policies in their school districts took several forms. A formal written policy governing the selection of materials was reported by 52.8 percent to be used. A formal written procedure for resolving challenges was reported by 49.1 percent to be used. A formal written procedure for resolving challenges was reported by 53.9 percent to constitute part of the selection policy. The librarians and library supervisors indicated that selection policies in their school districts took several forms. A formal written policy governing the selection of materials was reported by 74.3 percent to be used. A formal written procedure for resolving challenges was reported by 76.8 percent to be used. A formal written procedure for resolving challenges was reported by 70.8 percent to constitute part of the selection policy.

The textbook administrators in the 22 state-level adoption states indicated that state-level adoption applied to materials of different media. Basal materials were adopted by the state for the elementary level in 22 states, and for the secondary level in 19 states. Supplementary materials were adopted by the state for the elementary level in 11 states, and for the secondary level in nine states. Non-print materials were adopted by the

state for the elementary level in eight states, and for the secondary level in five states. They indicated that state-level selection procedures were organised in several ways: eight states had a single selection committee; ten states had separate selection committees for different subject areas; and four states used other ways. They also stated that state-level adoption policies stipulated particular conditions. The composition of selection committees was specified in 18 states. Publishers' representatives were permitted to make presentations to selection committees in 19 states. Special interest groups were permitted to make their views known to selection committees in 14 states. Authors, publishers or producers were permitted to defend materials challenged during the selection process in 12 states. Selection committees provided information to the community on controversial materials in nine states.

Comparisons between Local-Level Selection Procedures in State-Level and Local-Level Adoption States

Farr, Tulley & Rayford (1987) compared the outcomes of local-level procedures for selecting reading materials in state-level and local-level adoption states. The textbook provision in the state legislative statute of each state was analysed, state-level administrators in each state were interviewed, and a sample of 550 elementary school principals, evenly divided between school districts in state-level and local-level adoption states, was surveyed. Of 303 responding principals, 159 were from school districts in state-level adoption states and 144 were from school districts in local-level adoption states.

The analysis of the statutes in the 22 state-level adoption states identified prescriptions referring to nine categories: the adopting authority, subcommittees and commissions; curricular responsibilities; selection of the adopting authority; composition of the adopting authority; specified cycles and numbers of materials; specified criteria; public participation; and publisher requirements and restrictions. On the other hand, the subject matter in the statutes of the 28 local-level adoption states was discovered to be more diverse, and not similar enough to form clearly defined categories, except for contractual controls on textbook costs, restrictions on publishers and periods for textbook use.

The interviews with state-level administrators focused on the prices of materials and adoption cycles. It was found that administrators in the state-level adoption states commonly held that school districts in local-level adoption states could not pay less for materials, because state-level contracts required prices to be as low as available elsewhere, and that in the absence of state-level controls, prices would be greater. Administrators in every local-level adoption state, except six which applied state-level controls over prices, believed that school districts were paying as much or more than in state-level adoption states, because of the lack of volume purchasing powers and state-level controls. Most administrators in state-level adoption states believed the school districts in local-level adoption states were using older materials, because established adoption cycles in state-level adoption states required school districts to adopt new materials regularly. State-level administrators in local-level adoption states held a

different view, however, indicating that school districts operated voluntary adoption cycles.

Of the 303 responding principals, more than 80 percent in both state-level and local-level adoption states indicated that adoption cycles running from five to six years were applied. When tested statistically, this finding supported the view that there was no significant difference in the currency of materials used in school districts in state-level and local-level adoption states. However, 47 percent of respondents from state-level adoption states believed the prices of materials were the same or lower than those offered in local-level adoption states. On the other hand, 41 percent of respondents from local-level adoption states believed the prices of materials were the same or higher than those offered in state-level adoption states. When tested statistically, the prices paid for a particular reading material in state-level adoption states were significantly lower than prices paid for the same material in local-level adoption states.

Farr, Tulley & Rayford (1987) concluded that the costs of materials for school districts in state-level adoption states were significantly lower. However, there was no significant difference in the length of time materials were used or the titles of most frequently adopted materials used in school districts in state-level and local-level adoption states. They argued that school districts in both state-level and local-level adoption states achieved the same end, but through different means. Therefore, quality in materials and their match to the curriculum could be achieved without state-level adoption procedures.

Conclusion

The examination of research literature, covering almost 80 years, indicates that the essential features of procedures used to select textbooks in the states have endured throughout this period. Tulley & Farr (1990) concluded that early researchers were concerned primarily with classifying the dimensions of centralisation and decentralisation in selection procedures and the composition of adoption authorities in the states, but gave little, if any, attention to the specific selection procedures used in the various states. These limitations place constraints on drawing inferences from this early body of research. Although these studies make it possible to trace the chronological movement of individual states towards the use of state-level textbook adoption, they do not offer an explanation for the increasing trend towards centralisation of textbook adoption procedures in the late nineteenth and early twentieth centuries.

More recent interest in textbook adoption was stimulated by general criticisms of education that reached a climax during the excellence debate. Beginning in the late 1960s, the focus of inquiry into textbook adoption shifted from descriptive summaries of types of selection procedures to more analytical investigations into how these procedures were conducted, and widened to examine the issues of the intent and influence of state-level adoption. The study reported by the Institute for Educational Development (1969) appears to be the first to show that the dichotomy between state-level and local-level adoption procedures disguised more important aspects of diversity, which differentiated groups within these two types. It was found

that the major differences between selection patterns resulted from demographic differences and the attitudes of participants in the selection process at the local level. The studies reported in 1985 on the intents of state-level adoption identified an extensive range of textbook provisions in state legislative statutes, but found that the purpose was most closely associated with controlling cost and the marketing practices of publishing companies. In general, research findings contending that state-level adoption procedures of populous states, influence the content of textbooks marketed elsewhere in the USA, presented little empirical data to support this argument. Sturm and Weiss (1988), who reported the only research study to present evidence based on extensive empirical data, refuted many of the claims made for the significance of this effect. Since the three studies on local-level selection procedures published by Jensen (1931), Kunder (1976) and Kamhi (1981) treated a multitude of discrete variables, it is only possible to provide an analysis of a small proportion of the data across the three studies. These studies presented conflicting data about the basis for choosing members and the purposes of selection committees, but agreement that the basis for appointment of selection committees was temporary. Overwhelmingly, data from the three studies indicated that selection committees permitted publishers to make presentations. The major difference in roles of local-level selection committees in choosing materials from state-adopted lists in state-level adoption states or selecting materials in local-level adoption states is cited in research literature. However, the single comparative study on the effects of these distinct roles for local-level selection committees in state-level and local-level adoption states suggests that differences in outcomes are insignificant in terms of the quality of selected materials and their match to the curriculum.

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