Guidelines
for the
Evaluation & Selection
of Learning Resources

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Guidelines for the Evaluation and Selection of Learning Resources

INTRODUCTION

In October of 2001, the Director of English Programs, asked the Resource-Based Learning Consultant, to strike a committee to examine any previously developed policies in Prince Edward Island dealing with the area of selection of learning resources and procedures for dealing with challenged materials. After a review of these local policies, as well as those in other jurisdictions, the committee determined that there was a need to develop continuity between the Department of Education, School Boards/District, and schools in respect to selection issues. It was also determined that a consistent approach in dealing with these matters was necessary. The committee reviewed documentation in this area and developed recommendations for the education system. A commitment was made to develop guidelines that clearly detailed the necessity for consistency in practice but were flexible for individual adjustments.

The Philosophy of Education for Prince Edward Island, Department of Education Prince Edward Island, February 1990, states, “the purpose of the Prince Edward Island public education system is to provide for the development of children so that each may take a meaningful place in (a democratic) society”. According to MINISTER’S DIRECTIVE NO. MD 00-07 School Libraries, “In today’s society, which is increasingly information-rich and knowledge-based, the school library program should equip students with skills and an appreciation of life-long learning”. It is the responsibility of personnel at the Department of Education and School Boards/District, administrators, teacher-librarians, and teachers to provide an instructional program and learning resources that promote the enjoyment of reading and enable learners to become critical and creative thinkers as well as effective users of information in all formats and media. This is best achieved through resource-based learning and a collaboration among all members of the school community.

It is the belief of this committee that school programs will be enhanced through a clear and consistent approach, province-wide, around the selection of learning resources and the procedures for dealing with challenged materials.
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PART I

SELECTION OF LEARNING RESOURCES

I. STATEMENT OF PRINCIPLE

The purpose of this document is to provide guidelines for the evaluation and selection of learning resources for the public schools in Prince Edward Island.

II. OBJECTIVES OF SELECTION

A. For the purposes of this document;

(1) “Learning Resources” will refer to any person(s) or any material (whether acquired or locally produced) with instructional content or function that is used for formal or informal teaching/learning purposes. Learning resources may include, but are not limited to, print and non-print materials, audio, visual, electronic and digital hardware/software resources and human resources.

(2) “Resource-Based Learning” will refer to the approach promoted across the APEF (Atlantic Provinces Education Foundation) core curricula and French curriculum documents that actively involves students, teachers and teacher-librarians in the effective use of a wide range of print, non-print and human resources. This approach fosters the development of individual students by accommodating their varied interests, experiences, learning styles, needs and ability levels.

(3) “Selection Tools/Aids” will refer to bibliographies that include an evaluative or critical annotation for each item, providing recommendations; bibliographic information for each item; purchasing information; access to entries by author, title, subject, format, and even audience approaches to aid in locating recommended materials; and analytical indices, appendices, or other special features useful in helping students and teachers locate portions of works that may be in the school’s collection. Selection tools/aids exist in a variety of print and digital formats e.g. books, reviewing periodicals, and bibliographic essays.

B. The resource-based learning approach supports, enriches and helps to implement the educational program of the school through the interaction of professional personnel, students, and parents/guardians of the school community. It is the duty of professional staff to provide students with a wide range of materials at varying levels of difficulty, with a diversity of appeal and the presentation of different points of view.

C. It is the responsibility of all professional staff at the Department, School Board/District and school levels:

S To select resources that will enrich and support the curriculum, taking into consideration the diversity of interests and perspectives, the variety of abilities, learning styles and maturity levels of the learners served;

S To select resources that will stimulate growth in factual knowledge, literary appreciation, aesthetic values, and knowledge of societal standards;
S To select resources that positively and accurately reflect diverse perspectives of controversial issues ensuring that learners have an opportunity to develop, under guidance, the practice of critical analysis and to make informed judgements in their daily lives;
S To select resources representative of gender, appearance, sexual orientation, ability/disability, belief system, family structure, race and ethnicity, and socio-economic status;
S To assure a comprehensive collection appropriate to the school community by considering the appropriateness of placing principle above personal opinion and reason above prejudice in the selection of specific resources.

III. RESPONSIBILITY FOR SELECTION OF LEARNING RESOURCES

While recommendations for selection of learning resources involves many partners such as: Department & School Board/District personnel, administrators, teacher-librarians, teachers, students, members of the community; the responsibility for coordinating the selection and acquisition of school learning resources rests with Department & School Board/District personnel and at the school level with the principal and the teacher-librarian. It is understood that teachers will be selecting and acquiring learning resources for their individual classrooms. Teachers should consider the criteria outlined in this document when making their selection choices. If clarification is required regarding the appropriateness of a resource, teachers should consult with their principal or teacher-librarian.

IV. CRITERIA FOR SELECTION OF LEARNING RESOURCES

A. Every effort should be made to ensure that resources are selected for their strengths rather than rejected for their weaknesses. The following criteria will be used as they apply:

1. Learning resources should support and be consistent with provincial and local pilot/program curriculum outcomes.
2. Learning resources should be developed by competent authors and producers and shall meet high standards of quality in factual content and presentation.
3. Learning resources should be appropriate for the subject area and for the age, emotional development, ability level, learning styles and social development of the students for whom the materials are selected.
4. Learning resources should have aesthetic, literary, and/or social value.
5. Physical format and appearance of learning resources should be suitable for their intended use.
6. Learning resources should depict the roles of either sex in a non-stereotypical manner.
7. Learning resources should be chosen to enhance students’ understanding of a multicultural and diverse society.
8. Learning resources should be chosen to help students understand the many important contributions made to our civilization by minority and ethnic groups.
9. Learning resources should be designed to motivate students and staff to examine their attitudes and behaviors and to comprehend their duties, responsibilities, rights and privileges as participating citizens in our society.
10. Biased or slanted learning resources may be provided to meet specific instructional outcomes; for example, to recognize propaganda and its purpose in a given context, to extend critical thinking skills, and/or to balance an argument.

B. Learning resources on controversial issues should be selected with a focus towards maintaining a balanced collection representing various views. These resources should be chosen to show the relationship between contemporary issues and past issues with an emphasis placed on recognizing and understanding social and economic challenges.

C. Canadian learning resources should be given preference where appropriate. These include learning resources by or about a Canadian person, about a region or event, and/or published or produced in Canada.

V. PROCEDURES FOR SELECTION OF LEARNING RESOURCES

A. In selecting learning resources, professional personnel should evaluate available resources and curriculum needs and consult reputable, professionally prepared selection tools/aids and other appropriate sources. The actual resource should be examined whenever possible.

B. Recommendations for acquisition may involve Department, School Board/District, school, and community personnel, as appropriate.

C. Selection criteria should be considered to evaluate learning resources chosen for classroom use.

D. Selection criteria should be considered to evaluate gift materials.

E. Selection is an ongoing process which should include the removal of materials no longer appropriate and the replacement of lost and worn materials still of educational value.
PART II

PROCEDURES FOR DEALING WITH CHALLENGED MATERIALS

I. STATEMENT OF PRINCIPLE

Although care has been taken to select appropriate resources for student use, there may be occasional objections. Any staff member, student, parent, or legal guardian of a student in the school may challenge learning resources used in that school’s educational program on the basis of appropriateness. The procedures outlined below are for the purpose of illustrating the options of those persons in the schools and the community who are not directly involved in the selection process.

Other community members, not included above, who wish to challenge learning resources should direct their inquiries to the appropriate School Board/District personnel. It is recommended that the outlined procedures should be followed when informal complaints or requests for formal consideration are received in order to determine whether challenged resources are appropriate for their intended educational use.

II. REQUEST FOR INFORMAL RECONSIDERATION

The school receiving a complaint regarding a learning resource should try to resolve the issue informally. The following steps are recommended;

1. The principal or other appropriate staff should explain to the questioner the selection procedures and criteria.
2. The principal or other appropriate staff should explain the particular place the questioned resource occupies in the education program, its intended educational purpose, and additional information regarding its use.
3. The Request for Informal Reconsideration of a Learning Resource Form (Appendix A) should be completed for all informal complaints or requests and forwarded to the designated personnel.

If, after the informal process is completed, the questioner wishes to file a formal challenge, the Request for Formal Reconsideration of a Learning Resource Form (Appendix B) should be submitted to the school principal who will forward it to the appropriate School Board/District or Department of Education personnel.

Formal reconsiderations will be addressed only after the informal procedures have been followed and deemed insufficient. Records of discussions with the questioner and the teacher/staff member involved with the selection of the questioned resource shall be kept on file and made available to the reconsideration committee.
III. REQUEST FOR FORMAL RECONSIDERATION FOR LEARNING RESOURCES SELECTED AT THE SCHOOL BOARD/DISTRICT OR SCHOOL LEVEL

A. Preliminary Procedures

1. Each school should keep on hand and make available the Request for Formal Reconsideration of Learning Resources forms (Appendix B). All formal objections to learning resources should be made on these forms.
2. Request for Formal Reconsideration of Learning Resources forms should be signed by the questioner and filed with the principal.
3. The School Board/District Superintendent of Education should be informed of the formal complaint received.
4. Requests for reconsideration submitted by any staff member, student, parent, or legal guardian of a student in the school should be referred to a reconsideration committee, at the school level, for re-evaluation of the resource.
5. Requests for reconsideration submitted by other members of the community should be directed to the appropriate School Board/District Superintendent of Education. Board/District personnel may wish to adapt the procedures outlined in this document to meet these specific challenges.
6. When a request for formal reconsideration of a learning resource is initiated, the questioner should be given a copy of the procedures that will be followed to address the request.

B. The Reconsideration Committee

1. Upon receipt of a request for formal reconsideration of a learning resource, the principal is responsible for:
   • Initiating the formation of the reconsideration committee which should include:
     S One member of the School Board/District staff;
     S One teacher, from another school within the School Board/District, at the appropriate grade and/or program level, chosen by School Board/District personnel;
     S One member of the school community chosen by the local Home and School Association and/or the School Council;
     S Two students, at the appropriate grade and/or program level, chosen by the principal (the two students need not sit on the committee and/or take part in the discussion, but their reactions to the challenged material should be clearly ascertained).
   • Establishing a meeting date as soon as possible after the formal challenge is received.
2. The reconsideration committee should choose their chairperson at their first meeting.
3. The reconsideration committee should review all records of discussion from the informal reconsideration process and the challenged resource to determine whether or not it conforms to the Guidelines for the Evaluation and Selection of Learning Resources.
C. Resolution

1. The reconsideration committee should proceed within these guidelines:
   • Examine all documentation from the informal challenge process;
   • Examine the challenged resource and form opinions based on the material as a whole rather than on passages or sections taken out of context;
   • Determine professional acceptance by reading critical reviews of the resource;
   • Discuss the challenged resource in the context of its strengths and limitations within the educational program;
   • Discuss the challenged resource, if deemed necessary, with the individual questioner and the educator who selected the resource;
   • Reach the decision within six (6) weeks of the receipt of the reconsideration form within the confines of that school year;
   • Prepare a written report.
2. The written report should be discussed with the individual questioner and/or the educator who selected the resource, if requested.
3. The written report shall be retained by the school principal, with copies forwarded to the appropriate School Board/District personnel and the questioner. A minority report may be filed if consensus is not reached.
4. The decision of the reconsideration committee is final.
5. Notwithstanding any procedure outlined in this document, the questioner shall have the right to appeal any decision of the reconsideration committee to the School Board/District Trustees as the final review panel.

D. Guiding Principles

1. Any staff member, student, parent, or legal guardian of a student in the school may question learning resources used in that school’s educational program on the basis of appropriateness. Questions may arise despite the fact that the individuals selecting such resources were qualified to make the selection, followed the proper procedure and observed the criteria for selecting learning resources.
2. The principal should review the Guidelines for the Evaluation and Selection of Learning Resources document with the staff annually. The staff should be reminded that the right to challenge exists.
3. Parents/Guardians have the right to question reading, viewing or listening resources for their own children, not for other students.
4. Although it is the learning resources which are questioned, the principles of the freedom to read/listen/view must be defended.
5. Access to challenged material shall not be restricted during the reconsideration process.
6. The major criterion for the final decision is the appropriateness of the material for its intended educational use.
7. A decision to sustain a challenge shall not be interpreted as a judgement of irresponsibility on the part of the professionals involved in the original selection and/or use of the material.
IV. REQUEST FOR FORMAL RECONSIDERATION FOR CURRICULUM LEARNING RESOURCES SELECTED AT THE DEPARTMENT OF EDUCATION LEVEL

A. Preliminary Procedures

1. Each school should keep on hand and make available the Request for Formal Reconsideration of Learning Resources forms (Appendix B). All formal objections to learning resources should be made on these forms.
2. Request for Formal Reconsideration of Learning Resources forms should be signed by the questioner and filed with the principal.
3. The School Board/District Superintendent of Education should be informed of the formal complaint received.
4. Requests for reconsideration submitted by any staff member, student, parent, or legal guardian of a student in the school should be forwarded to the appropriate Director of Programs or Services at the Department of Education.
5. Requests for reconsideration submitted by other members of the community should be directed to the appropriate School Board/District Superintendent of Education who in turn will forward it to the appropriate Director of Programs or Services at the Department of Education. Department personnel may wish to adapt the procedures outlined in this document to meet these specific challenges.
6. When a request for formal reconsideration of a learning resource is initiated, the questioner should be given a copy of the procedures that will be followed to address the request.

B. The Reconsideration Committee

1. Upon receipt of a request for formal reconsideration of a learning resource, the director is responsible for:
   - Initiating the formation of the reconsideration committee which should include:
     S One or two consultants not directly involved with the selection of the resource;
     S One teacher at the appropriate grade and/or program level;
     S One parent selected by the provincial (PEI)Home and School Association;
     S Two students, at the appropriate grade and/or program level, chosen by a principal (the two students need not sit on the committee and/or take part in the discussion, but their reactions to the challenged material should be clearly ascertained).
   - Establishing a meeting date as soon as possible after the formal challenge is received.
2. The reconsideration committee should choose their chairperson at their first meeting.
3. The reconsideration committee should review all records of discussion from the informal reconsideration process and the challenged resource to determine whether or not it conforms to the Guidelines for the Evaluation and Selection of Learning Resources.
C. Resolution

1. The reconsideration committee should proceed within these guidelines:
   • Examine all documentation from the informal challenge process;
   • Examine the challenged resource and form opinions based on the material as a whole rather than on passages or sections taken out of context;
   • Determine professional acceptance by reading critical reviews of the resource;
   • Discuss the challenged resource in the context of its strengths and limitations within the educational program;
   • Discuss the challenged resource with the individual questioner and the educator who selected the resource, if requested;
   • Reach the decision within six (6) weeks of the receipt of the reconsideration form;
   • Prepare a written report.
2. The written report should be discussed with the individual questioner if requested.
3. The written report shall be retained by the director with a copy forwarded to the questioner. A minority report may be filed if consensus is not reached.
4. The decision of the reconsideration committee is final.
5. Notwithstanding any procedure outlined in this document, the questioner shall have the right to appeal any decision of the reconsideration committee to the Minister of Education as the final review panel.

D. Guiding Principles

1. Any member of the community may question authorized curriculum learning resources, for use in the public school system, on the basis of appropriateness. Questions may arise despite the fact that the individuals selecting such resources were qualified to make the selection, followed the proper procedure and observed the criteria for selecting learning resources.
2. The director should review the Guidelines for the Evaluation and Selection of Learning Resources document with the staff annually. The staff should be reminded that the right to challenge exists.
3. Although it is the learning resources which are questioned, the principles of the freedom to read/listen/view must be defended.
4. Access to challenged material shall not be restricted during the reconsideration process.
5. The major criterion for the final decision is the appropriateness of the material for its intended educational use.
6. A decision to sustain a challenge shall not necessarily be interpreted as a judgement or irresponsibility on the part of the professionals involved in the original selection and/or use of the material.
APPENDIX A

REQUEST FOR INFORMAL RECONSIDERATION
OF A
LEARNING RESOURCE FORM
REQUEST FOR INFORMAL RECONSIDERATION OF A LEARNING RESOURCE FORM

RESOURCE IN QUESTION:

a) Title
b) Author
c) Publisher
d) Copyright Year
e) Format (ie. book, video, magazine)

DATE: _______________________

REASON(S) FOR COMPLAINT:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

COMPLAINANT: _____ Student _____ Parent/Guardian _____ Staff

RESOLUTION:
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

SCHOOL: ____________________________

SCHOOL PERSONNEL INVOLVED: __________________________

PRINCIPAL’S SIGNATURE: __________________________

Forward completed forms to:
Resource-Based Learning Consultant
Department of Education
PO Box 2000
Charlottetown, PE C1A 7N8
Tel: (902) 368-4633 Fax: (902) 368-4622
APPENDIX B

FORMAL REQUEST FOR RECONSIDERATION OF A LEARNING RESOURCE FORM
FORMAL REQUEST FOR RECONSIDERATION
OF A LEARNING RESOURCE FORM

SCHOOL CONCERNED: _________________________________________________

REQUEST INITIATED BY:  ____Student  ____Parent/Guardian  ____Staff

Name: _____________________________________________________________

Address: ___________________________________________________________

___________________________ Telephone: ____________________________

RESOURCE IN QUESTION:

a) Title _____________________________________________________________

b) Author ____________________________________________________________

c) Publisher _________________________________________________________

d) Copyright Year _______________

e) Format (ie. book, video, magazine) _________________________________

(1) To what in the resource do you object? (please be specific, page #s, etc.)

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

____________________________________________________________________

(2) Did you read, listen to, or view the entire resource?

____________________________________________________________________

If not, what pages or selections?

____________________________________________________________________

____________________________________________________________________
3. (A) Have you discussed this resource with the student(s) involved?

_______________________________________________________

What was the response?

_______________________________________________________

_______________________________________________________

_______________________________________________________

(B) Have you discussed this resource with the teacher(s) involved?

_______________________________________________________

What was the response?

_______________________________________________________

_______________________________________________________

_______________________________________________________

4. (A) What do you feel might be the positive effect of reading, listening to, or viewing this resource?

_______________________________________________________

_______________________________________________________

_______________________________________________________

(B) What do you feel might be the negative effect of reading, listening to, or viewing this resource?

_______________________________________________________

_______________________________________________________

_______________________________________________________

A reconsideration committee may choose to consult Department of Education staff and/or community persons with professional knowledge concerning this resource.

DATE: _____________________ SIGNATURE: ________________________

PLEASE RETURN THIS COMPLETED FORM TO YOUR SCHOOL PRINCIPAL


