The Changing Education Marketplace

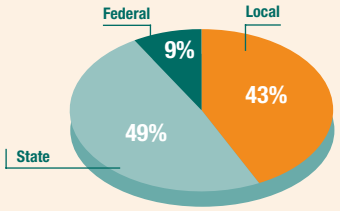
No Child Left Behind (NCLB) introduced sweeping changes that have affected every public school in the United States. NCLB's goal is to close the student achievement gap and get every child to grade level by the 2013-14 school year. To meet this requirement, educators are putting more focus on reading and math and turning to intervention products to help underperforming students. Educators are also increasingly employing technology to enhance learning and increase student achievement.

Education Funding and Expenditures per Pupil

Of the approximately $440 billion in federal, state, and local funding for public education in the 2002–03 school year, 92 percent was provided by state and local governments. More than two-thirds of the $216 billion funded by the states came from sales and income tax. At the local level, property taxes accounted for 65%, or $122 billion, of the $188 billion local funding amount. States spent an average of $8,044 for every student in 2002–03. This represents a 4 percent increase from the previous school year. Expenditures per student are projected to increase to $10,000 by 2014.

The Public Education Dollar: Revenues by Source

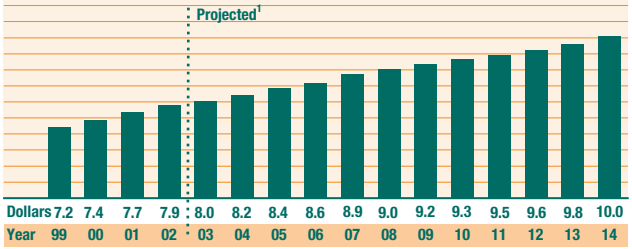
Total Revenue: $440 billion



Source: U.S. Department of Education, National Center for Education Statistics, Common Core of Data, "National Public Education Financial Survey, 2002-03"

Current and Projected Expenditures per Pupil in K–12

(in thousands, in constant 2002-2003 dollars)

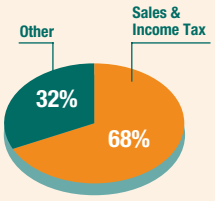


Source: U.S. Department of Education, National Center for Education Statistics, "Projections of Education Statistics to 2014"

[1] Middle range of projections cited

Sources of State Funding

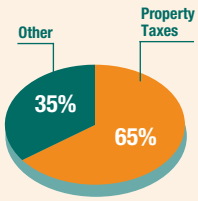
Total State Revenue: $216 billion



Source: U.S. Census Bureau, "Public Education Finances Report: 2003"

Sources of Local Funding

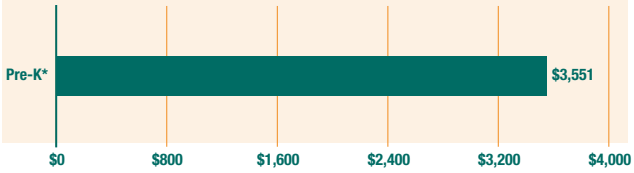
Total Local Revenue: $188 billion



Source: U.S. Census Bureau, "Public Education Finances Report: 2003"

National Average Spending per Child Enrolled in Pre-K Programs

(2005 dollars)



Source: National Institute for Early Education Research, "The State of Preschool: 2005 State Preschool Yearbook"

* Pre-K may receive additional funds from federal or local sources that are not included in this figure

Pre-K Education: Improving School Readiness

A study conducted by the *National Institute for Early Education Research* provides strong evidence that quality pre-school programs produce broad gains in children's learning and development at kindergarten entry – progress that can be expected to yield greater school success and later improvements in reading and math. The 2004 study measured the academic effects of five high-quality state-funded pre-K programs. The children who attended the pre-school programs made significant gains in nearly all measures of learning regardless of ethnic background or economic circumstances. Participants included 5,278 children in 1,320 pre-school and kindergarten classrooms in Michigan, New Jersey, Oklahoma, South Carolina, and West Virginia.

Gains were made in key areas:

- *Vocabulary*: Children's average vocabulary scores increased 8 percent.
- *Early Math Skills*: Children's average math scores increased 13 percent. Skills tested included basic number concepts, simple addition and subtraction, telling time, and counting money.
- *Print Awareness*: Children's average print awareness scores increased 39 percent. Children who attended a state-funded pre-school program before entering kindergarten knew more letters, more letter-sound associations, and were more familiar with words and book concepts.

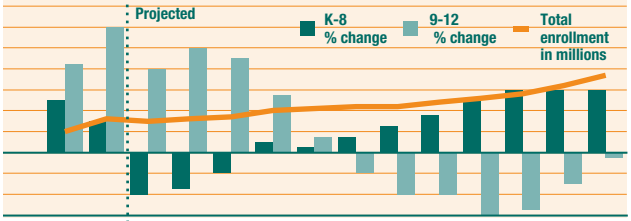
Source: National Institute for Early Education Research, "The Effects of State Pre-Kindergarten Programs on Young Children's School Readiness in Five States," December 2005

Pre-K–12: Growing Enrollments

School enrollments are on the rise. According to the latest projections by the National Center for Education Statistics, 56.7 million students will be enrolled in grades K–12 by 2014. Enrollment in pre-K reached approximately 950,000 children in the 2003–2004 school year. The trend toward full-day kindergarten is also growing and demonstrates the increased recognition that early childhood education improves school readiness and improves the development of verbal and math skills – both keys to future academic success.

Enrollment in Elementary and Secondary Institutions

(% change; enrollment in millions)

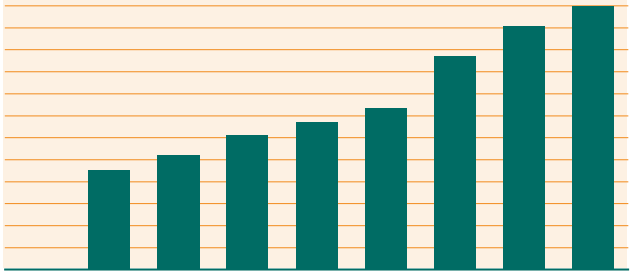


K-8	1.0	0.6	-0.8	-0.7	-0.4	0.2	0.1	0.3	0.5	0.7	1.0	1.2	1.2	1.2
9-12	1.7	2.4	1.6	2.0	1.8	1.1	0.3	-0.4	-0.8	-0.8	-1.2	-1.1	-0.6	-0.1
Total	54.0	54.6	54.5	54.6	54.7	55.0	55.1	55.2	55.2	55.4	55.6	55.8	56.2	56.7
Year	01	02	03	04	05	06	07	08	09	10	11	12	13	14

Source: U.S. Department of Education, National Center for Education Statistics, "Projections of Education Statistics to 2014"

Public School Pre-Kindergarten Enrollment, 1996-2004

(number of students in thousands)

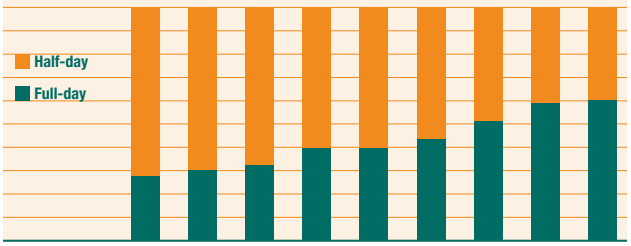


Enroll	670.4	695.1	728.7	751.2	776.1	865.1	914.9	949.6
Year	96-97	97-98	98-99	99-00	00-01	01-02	02-03	03-04

Source: U.S. Department of Education, National Center for Education Statistics, Common Core of Data

Kindergarten Enrollment Trends

(number of students in millions)



Total	3.2	3.1	3.3	3.9	3.8	4.0	3.8	3.8	3.7
Full-day	0.9	1.0	1.1	1.6	1.5	1.8	2.0	2.2	2.2
Year	77	80	83	86	89	92	95	98	01

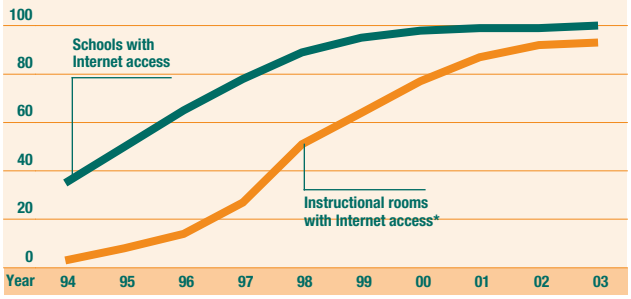
Source: National Center for Education Statistics, "The Condition of Education 2004"

Access to Technology Is Improving in K–12 Education

Technology is playing an increasingly important role in education. The use of computers in schools is substantially changing the way students learn and how they are taught. From 1994 to 2003, the percentage of public schools with access to the Internet increased from 35 to 100 percent, and the proportion of instructional rooms with Internet access increased from 51 percent to 93 percent. The number of students per computer has also improved over the last ten years. In 2003, the ratio of students to instructional computers with Internet access in public schools was 4.4 to 1, a decrease from the 12.1 to 1 ratio in 1998, when it was first measured.

Internet Access in U.S. Public Schools and Classrooms

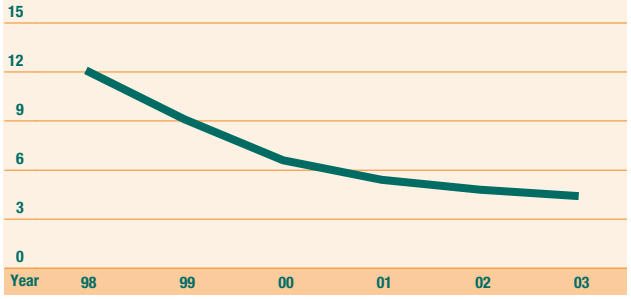
(percent)



Source: U.S. Department of Education, National Center for Education Statistics, Fast Response Survey System, Internet Access in U.S. Public Schools and Classrooms: 1994-2003; and unpublished data

Ratio of Public School Students to Instructional Computers with Internet Access

(ratio)

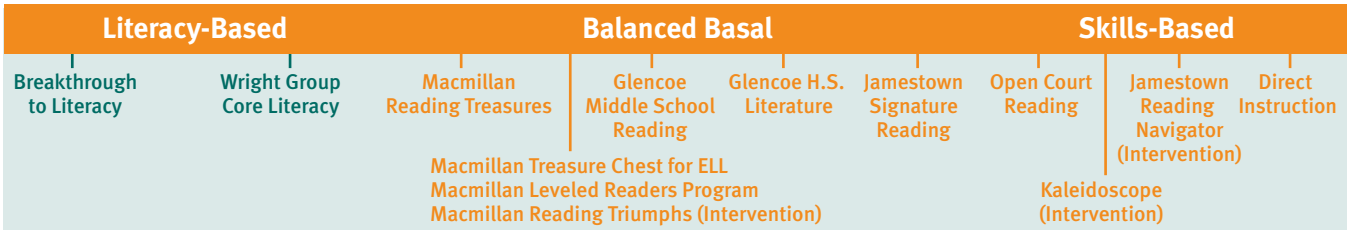


Source: U.S. Department of Education, National Center for Education Statistics, Fast Response Survey System, Internet Access in U.S. Public Schools and Classrooms: 1994-2003; and unpublished data

READING AND MATH: TEACHING THE COMPLETE SPECTRUM

With annual testing in reading and math now mandatory under the *No Child Left Behind Act*, student performance is getting increased scrutiny. In this environment, McGraw-Hill Education's goal is to provide educators with the solutions they need to help improve student achievement. With investments in new and revised programs like *Treasures*, *Jamestown Reading Navigator*, and *Real Math*, McGraw-Hill Education is strengthening the broadest and most complete lineup in the marketplace.

READING (Programs in orange are new or major revisions for 2006-2008)

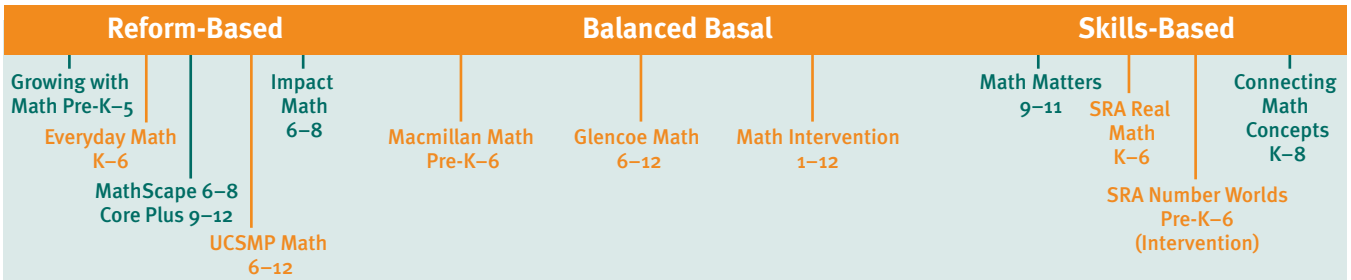


Literacy-Based
These programs work well in districts where students begin formal schooling with basic skills acquired at home or in academic pre-schools. Reading programs in this category develop language learning through literature.

Balanced Basal
The traditional basal program is effective with most students.

Skills-Based
These programs have proven to be especially effective with students who come from disadvantaged backgrounds, have limited proficiency in English, or have special needs. Lesson plans are highly structured.

MATH (Programs in orange are new or major revisions for 2006-2008)



Reform-Based
These math programs emphasize investigative problem-solving activities and work well in school districts where teachers have strong math backgrounds and effective staff development is in place. Most of these programs receive National Science Foundation funding.

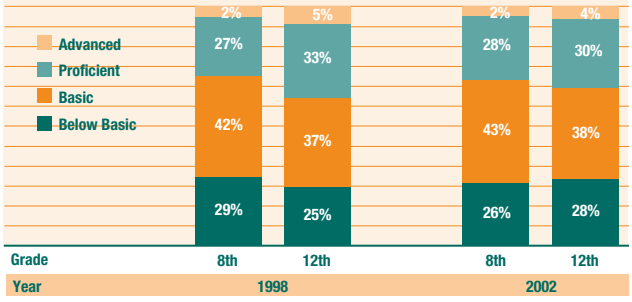
Balanced Basal
Effective with most students, these programs are well suited for school districts that need flexible lesson plans to accommodate a variety of teaching styles and meet each student's individual needs.

Skills-Based
These products have been designed for school districts where skill development is the most important aspect of the math program. Lesson plans are highly structured and often involve direct instruction.

THE NATION'S REPORT CARD™

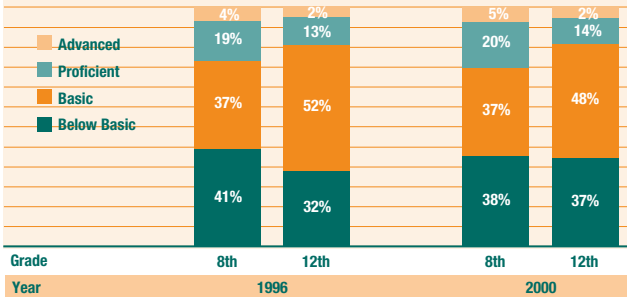
According to the National Association of Education Progress, two-thirds of America's eighth and twelfth grade students are not proficient in math or reading. The NAEP results are reported at achievement levels – performance standards showing what students should know and be able to do. In reading, the bulk of older struggling students can read the words but do not comprehend their meaning. In math, these students often lack a basic understanding of how to solve real-world problems. The achievement levels from lowest to highest are Basic (partial mastery of knowledge and skills fundamental for proficient work at a given grade), Proficient (solid academic performance; demonstrated competency over challenging subject matter), and Advanced (superior performance).

Reading Achievement of 8th and 12th Graders



Source: U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics
Note: Detail may not sum due to rounding

Math Achievement of 8th and 12th Graders



Source: U.S. Department of Education, Institute of Education Sciences, National Center for Education Statistics
Note: Detail may not sum due to rounding

Education Reform: New Opportunities for The McGraw-Hill Companies

Four years after the enactment of the *No Child Left Behind Act*, states are putting in place rigorous new accountability systems and will implement reading and math assessments covering all students in grades 3–8 by the end of the 2005-06 school year. With many of the key elements of the law in place, states and school districts will increasingly focus on making the substantial annual improvement in student achievement needed to reach the 100% proficiency goal by 2014. The Act's stronger accountability requirements will result in additional assessment, testing, reporting, early childhood education, and intervention opportunities.

Federal Funding for Major NCLB Programs

Federal grants will be made to state education agencies each year for a six-year period, subject to annual appropriations and reports of satisfactory progress. *No Child Left Behind* comes up for reauthorization in 2007.

	Appropriated Federal Funds						
Major Programs	**Year 1 Funding** from Fed FY 2002	**Year 2 Funding** from Fed FY 2003	**Year 3 Funding** from Fed FY 2004	**Year 4 Funding** from Fed FY 2005	**Year 5 Funding** from Fed FY 2006	**Year 6 Funding** from Fed FY 2007[1]	**Comments**
Testing (State Assessments)	$387.0 million	$384.5 million	$390.0 million	$411.7 million	$407.6 million	$407.6 million	Annual testing in reading and math for grades 3–8 and once in high school; Annual testing in science at three grade levels
Reading First	$900.0 million	$993.5 million	$1.024 billion	$1.042 billion	$1.029 billion	$1.029 billion	Reading programs to ensure every child can read at or above grade-level by end of third grade
Early Reading First	$75.0 million	$74.5 million	$94.4 million	$104.2 million	$103.1 million	$103.1 million	Supports school readiness of pre-school-aged children, particularly from low-income families
Striving Readers	–	–	–	$24.8 million	$29.7 million	$100.0 million	Research-based instruction for teenagers reading below grade level
Mathematics and Science Partnerships	$12.5 million	$100.3 million	$149.1 million	$178.6 million	$182.2 million	$182.2 million	Promotes strong teaching skills for elementary and secondary math and science teachers
Improving Teacher Quality	$2.85 billion	$2.93 billion	$2.93 billion	$2.92 billion	$2.89 billion	$2.89 billion	Funding to help states meet highly-qualified teacher requirement
State Grants for Innovative Programs	$385.0 million	$382.5 million	$296.5 million	$198.4 million	$99.0 million	$99.0 million	Administrative programs, including independent analysis to measure and report school district performance

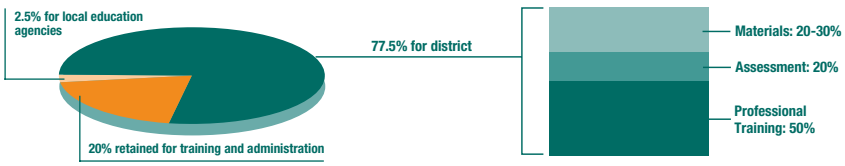
[1] Year 6 funding levels were proposed by President Bush in February 2006 as part of the 2007 Federal budget, which requires approval by Congress. New grants will be awarded to states between July and October 2006

Source: U.S. Department of Education

Following the Funding for *Reading First*

Allocation of Federal Funds at State- and District-Levels*

State Level

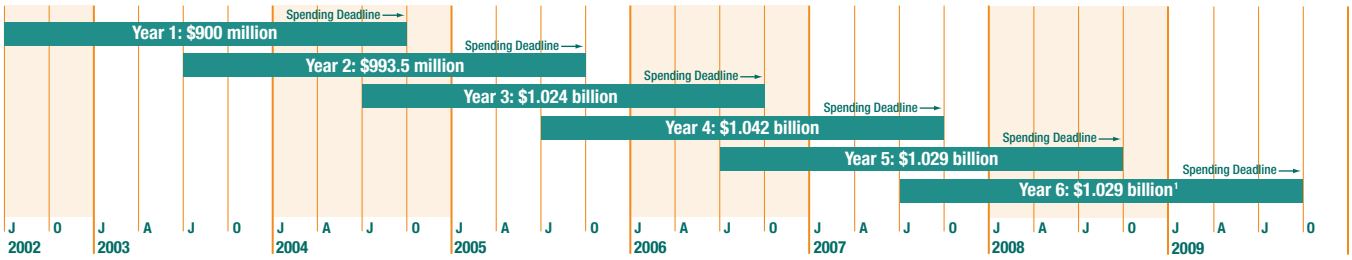


* Estimated

Performance Review

- Department of Education requires annual reports.
- Three years after Reading First funding awarded, State Education Agency must submit midpoint progress report to U.S. Dept. of Education.

Reading First Grants to States: Receipt of Funding and Spending Deadlines



Note: The fiscal year for 46 states in the United States is July to June

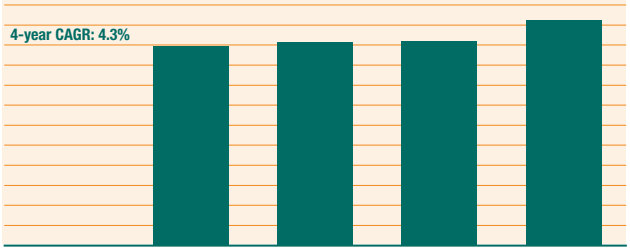
Pre-K–12 Education: Market, Adoption States, Open Territories, and Supplemental Sales

Pre-K–12 Sales

In 2005, sales of textbooks and educational materials for the pre-K–12 school market increased by 10.5% to $6.6 billion, according to the Association of American Publishers (AAP).

Estimated Total Pre-K–12 Industry Sales

(sales in millions)

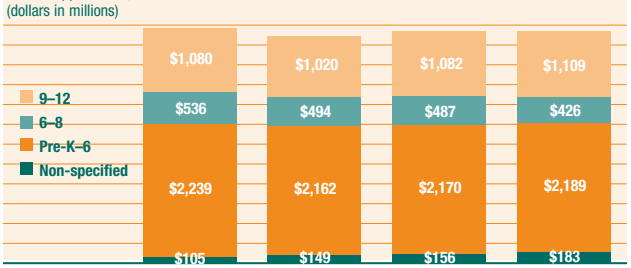


Note: Data has been restated to reflect the 2002 U.S. Economic Census

Source: AAP Includes sales of domestic and non-domestic products

Total Net Elementary/High School Sales

Basal, Supplemental, and Online Materials
(dollars in millions)



Source: AAP, as reported by 10 publishers. Includes sales of U.S. products only. Includes sales to foreign subsidiaries and third parties

Elementary Market (Pre-K–6)

Pre-K–6 Sales by State (in thousands)

		2004	2003
1	California	$ 227,333	$ 299,764
2	New York	116,806	92,099
3	Florida	107,839	85,549
	Top 3 for 2004	**$ 451,978**	**$ 477,412**
4	Texas	104,826	170,810
5	Illinois	77,720	86,050
6	New Jersey	76,708	69,752
7	Pennsylvania	74,178	78,492
8	Ohio	60,729	66,036
9	Virginia	53,654	47,317
10	North Carolina	50,824	36,834
	Top 10 for 2004	**$ 950,617**	**$1,032,703**
11	Michigan	44,552	47,704
12	Georgia	42,931	83,120
13	Maryland	39,186	32,119
14	Indiana	36,648	37,829
15	Arizona	34,428	35,178
	Top 15 for 2004	**$1,148,362**	**$1,268,653**
	All Others	**$ 494,654**	**$ 408,396**
	Total Domestic U.S.	**$1,643,016**	**$1,677,049**

Source: AAP, as reported by 10 publishers. Excludes supplemental and non grade-specific basal materials. State ranking varies each year in accordance with adoption cycle

Pre-K–6 Sales by Subject Category (in millions)

	2004	2003
Reading/Literature	$ 741	$ 775
Mathematics	525	407
Language Arts/English	104	101
Science	96	111
Social Studies	89	208
Religion	32	31
Music	27	31
All Others	29	13
Total	**$ 1,643**	**$ 1,678**

Source: AAP, as reported by 10 publishers. Excludes supplemental, non grade-specific basal, and non-domestic

Elementary Market (6–8)

6–8 Sales by State (in thousands)

		2004	2003
1	California	$ 36,379	$ 60,674
2	Florida	27,136	34,563
3	New York	19,476	22,226
	Top 3 for 2004	**$ 82,991**	**$ 117,463**
4	Pennsylvania	18,353	17,592
5	New Jersey	14,535	12,838
6	Ohio	13,703	13,641
7	Maryland	13,520	6,516
8	Virginia	12,465	6,759
9	North Carolina	12,175	13,943
10	Indiana	10,742	9,956
	Top 10 for 2004	**$ 178,484**	**$ 198,708**
11	Illinois	10,161	23,926
12	Michigan	9,202	11,240
13	Georgia	7,852	20,490
14	Arizona	6,784	6,721
15	Texas	6,725	38,099
	Top 15 for 2004	**$ 219,209**	**$ 299,184**
	All Others	**$ 111,784**	**$ 94,090**
	Total Domestic U.S.	**$ 330,992**	**$ 393,275**

Source: AAP, as reported by 10 publishers. Excludes supplemental and non grade-specific basal materials. State ranking varies each year in accordance with adoption cycle

6–8 Sales by Subject Category (in millions)

	2004	2003
Mathematics	$ 122	$ 77
Science	59	70
Language Arts/English	52	78
Social Studies	42	92
Reading/Literature	34	61
Foreign Language	16	14
Health	4	1
All Others	–	–
Total	**$ 331**	**$ 393**

Source: AAP, as reported by 10 publishers. Excludes supplemental, non grade-specific basal, and non-domestic

Secondary Market (9–12)

9–12 Sales by State (in thousands)

		2004	2003
1	California	$ 120,358	$ 103,440
2	Florida	94,581	82,352
3	New York	61,208	63,180
	Top 3 for 2004	**$ 276,147**	**$ 248,972**
4	Texas	52,127	130,225
5	Illinois	45,212	44,085
6	Pennsylvania	44,804	34,976
7	Georgia	38,961	19,941
8	New Jersey	38,376	32,135
9	Ohio	35,893	40,764
10	North Carolina	35,527	32,209
	Top 10 for 2004	**$ 567,048**	**$ 583,308**
11	Virginia	28,260	35,571
12	Indiana	28,033	28,612
13	Tennessee	27,673	25,225
14	Maryland	26,091	19,573
15	Michigan	25,410	25,843
	Top 15 for 2004	**$ 702,514**	**$ 718,133**
	All Others	**$ 330,816**	**$ 291,716**
	Total Domestic U.S.	**$1,033,330**	**$1,009,849**

Source: AAP, as reported by 10 publishers. Excludes supplemental and non grade-specific basal materials. State ranking varies each year in accordance with adoption cycle

9–12 Sales by Subject Category (in millions)

	2004	2003
Mathematics	$ 285	$ 164
Science	174	171
Social Studies	159	278
Reading/Literature	115	125
Foreign Language	109	91
Business Education	53	59
Language Arts/English	52	38
All Others	87	85
Total	**$ 1,033**	**$ 1,010**

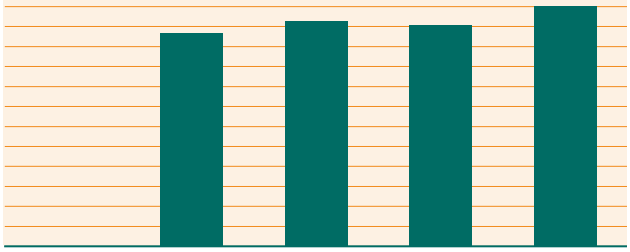
Source: AAP, as reported by 10 publishers. Excludes supplemental, non grade-specific basal, and non-domestic

Adoption States, Open Territories, and Supplemental Sales

Based on data from the AAP, growth in the elementary-high school market in 2004 came from the open territories and supplemental materials markets, which both increased 8.5%. The adoption market declined 7.5% due to limited opportunities in new state adoptions in 2004.

Supplemental Materials Market (Pre-K–12)

(sales in millions)

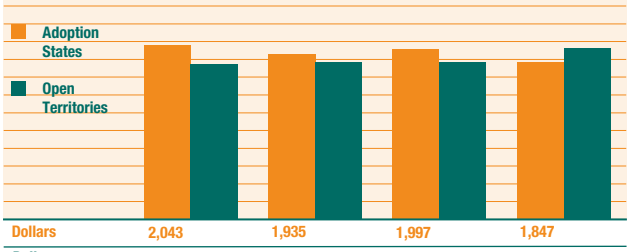


Dollars	618	654	642	696
Year	01	02	03	04

Source: AAP, as reported by 10 publishers. Includes non grade-specific materials

Industry Textbook Sales: Adoption States, Open Territories (Pre-K–12)

(sales in millions)



Dollars	2,043	1,935	1,997	1,847	
Dollars	1,823	1,842	1,846	2,003	
Year	01	02	03	04	

Source: AAP, as reported by 10 publishers. Includes non grade-specific basal and supplemental materials. Excludes non-domestic sales of $58 million, $52 million, $47 million, and $60 million for 2004, 2003, 2002, and 2001, respectively

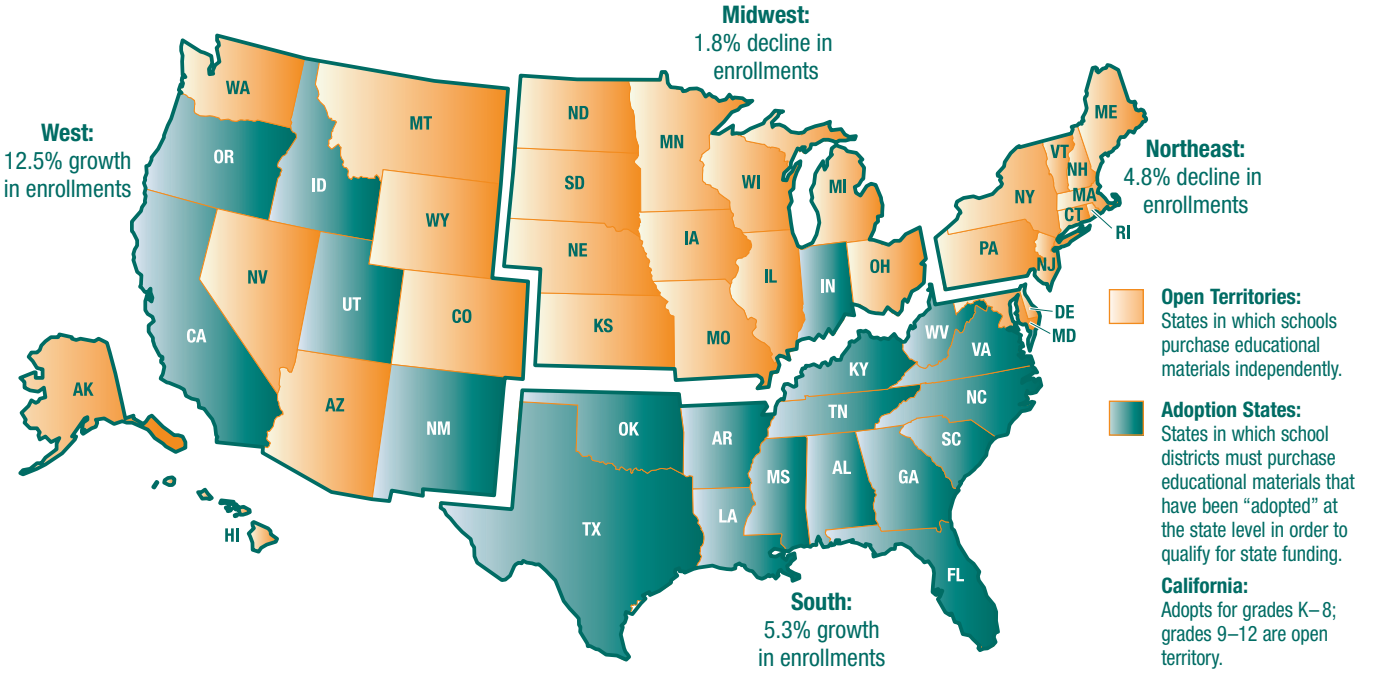
Mapping the Adoption Process

Nineteen states use the adoption process to buy elementary and secondary textbooks. A twentieth state, California, adopts textbooks through the eighth grade. In the adoption process, a state education board selects textbooks to be placed on an approved list. To use state education funds, local school districts must choose textbooks from the approved list. In adoption states, the state board issues curriculum guidelines and schedules the purchase of new books in each subject area. In the remaining states, known as "open territories," textbooks are purchased independently by local school districts or individual schools. There are no statewide purchasing schedules or state selected lists of textbooks.

Growing Enrollments in Key Adoption States

Changing U.S. K–12 Enrollment by Region, 2002–2014

Enrollments are growing faster in the key adoption states in the west and south as Americans continue to migrate to the Sunbelt.



Source: U.S. Department of Education, National Center for Education Statistics, "Projections of Education Statistics to 2014"

Elementary and Secondary School Adoption Schedules

EL-HI ADOPTION OPPORTUNITIES

Beginning in 2007, prospects improve for the rest of the decade as major adoption states plan to buy new materials. These new opportunities are a key factor in gauging the outlook for the elementary and secondary school markets.

ELEMENTARY SCHOOL ADOPTION SCHEDULE

Bid Year	2005	2006	2007	2008	2009	2010	2011
Purchase Year	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**
Reading	Kentucky North Carolina	Indiana (1-8) Oregon Tennessee West Virginia	Alabama Florida Idaho Louisiana Oklahoma	California Georgia New Mexico (P-8) South Carolina (K-5) Texas (K-5) *Texas (Span K-5)*	Mississippi	Arkansas North Carolina	Kentucky
Math	Arkansas	Georgia New Mexico (P-8) Texas (6-8) *Texas (Span 6)*	California Mississippi Texas (K-5) *Texas (Span K-5)*	Idaho Kentucky North Carolina (K-5) South Carolina	Alabama Florida (K-5) Indiana (1-8) Oklahoma Oregon	Tennessee West Virginia	–
English/ Language Arts	Kentucky North Carolina (3-5)	Idaho Mississippi Oregon	Indiana West Virginia	Alabama California Florida (K-5) Georgia Louisiana South Carolina (K-5) Texas (K-1) *Texas (Span 1)*	New Mexico (P-8) Tennessee (1-8) Texas (2-8) *Texas (Span 2-6)*	Arkansas North Carolina Oklahoma	Kentucky South Carolina (6-8)
Science	Alabama Florida New Mexico (P-8) Oklahoma West Virginia	Arkansas California South Carolina	Georgia Kentucky	Mississippi Oregon Tennessee	Idaho North Carolina	Florida Indiana (1-8) Louisiana Texas *Texas (Span K-6)*	Alabama New Mexico
Social Studies	California South Carolina	Kentucky Louisiana Oklahoma	Arkansas Idaho North Carolina Tennessee	Indiana (1-8)	West Virginia	Alabama Georgia New Mexico (P-8)	California Florida Mississippi South Carolina Texas *Texas (Span K-6)*
Health	New Mexico (P-8) South Carolina (6-8) West Virginia	Arkansas Florida Mississippi	Oregon	Georgia North Carolina Oklahoma Tennessee	Alabama Idaho Kentucky	Indiana Louisiana South Carolina (K-5)	New Mexico
Music	Indiana (1-8) Oregon Tennessee	Alabama California Idaho New Mexico (P-8) North Carolina Oklahoma	South Carolina	Florida West Virginia	Arkansas	Georgia Kentucky	Indiana Louisiana Mississippi Tennessee (1-8)
Spelling	Kentucky North Carolina (2-8) Tennessee (1-8)	Idaho Mississippi West Virginia	Florida Indiana	Alabama Georgia South Carolina (K-5)	–	Arkansas North Carolina Oklahoma	Kentucky Tennessee (1-8)
Literature	Idaho Kentucky North Carolina (6-8) Tennessee (6-8)	West Virginia (6-8)	Alabama Indiana Louisiana (6-8) Oklahoma	Florida (6-8) Texas (6-8) *Texas (Span 6)*	Mississippi	–	Kentucky
English as a Second Language (ESL)	–	–	–	Arkansas Florida	Georgia Tennessee (1-8) Texas (1-8)	Oklahoma Oregon	–
Handwriting	Kentucky North Carolina (1-5)	Indiana (1-8) Mississippi	Florida (K-5) South Carolina (K-3) West Virginia	Alabama	–	Arkansas Oklahoma	Kentucky Louisiana
Dictionaries	–	Idaho Mississippi (K-12)	–	Alabama Florida Georgia	–	Arkansas Oklahoma	–

Source: AAP School Division/NASTA

Notes:

Schedules are subject to change

Elementary adoptions are for grades K-8, unless otherwise noted

Secondary adoptions are for grades 6-12, unless otherwise noted

Italics indicate Spanish-language program

Secondary School Adoption Schedule

Bid Year	2005[1]	2006	2007	2008	2009	2010	2011
Purchase Year	**2006**	**2007**	**2008**	**2009**	**2010**	**2011**	**2012**
Science	Alabama Florida New Mexico Oklahoma West Virginia	Arkansas California (6-8) South Carolina (6-8)	Georgia Kentucky South Carolina[2] (9-12)	Mississippi Oregon South Carolina[2] (9-12) Tennessee	Idaho Florida North Carolina South Carolina[2] (9-12) Virginia	Florida Indiana Louisiana Texas *Texas (Span 6)*	Alabama New Mexico Oklahoma West Virginia
Social Studies	California (6-8) South Carolina[2] (6-8)	Kentucky Louisiana Oklahoma	Arkansas Idaho[2] North Carolina South Carolina[2] (9-12) Tennessee	Indiana Virginia	South Carolina[2] (9-12) West Virginia	Alabama Georgia New Mexico South Carolina[2] (9-12)	California (6-8) Florida Mississippi Oregon Texas
Mathematics	Arkansas	Georgia (6-8) New Mexico Texas *Texas (Span 6)*	California (6-8) Georgia (9-12) Mississippi	Idaho[2] Kentucky North Carolina South Carolina (6-8)	Alabama Florida Indiana Oklahoma Oregon South Carolina (9-12)	Tennessee Virginia West Virginia	Arkansas
Literature	Idaho Kentucky North Carolina (9-12) Tennessee	Indiana (6-8 Reading) Oregon West Virginia	Alabama Indiana Louisiana Oklahoma South Carolina (9-12)	Florida Georgia (6-8) New Mexico Texas *Texas (Span 6)*	Georgia (9-12) Mississippi	Arkansas (9-12) Idaho North Carolina (9-12) Virginia	Kentucky Tennessee
Reading	Kentucky North Carolina (6-8)	Indiana[2] Tennessee West Virginia	Alabama Florida[2] Idaho (Tradnl) Louisiana Oklahoma[2]	California[2] (6-8) New Mexico	Mississippi	Arkansas North Carolina (6-8) Oklahoma[2]	Kentucky
English/ Language Arts	Kentucky North Carolina South Carolina[2] (6-8)	Idaho[2] Mississippi Oregon	Indiana South Carolina[2] (9-12) West Virginia	Alabama California[2] (6-8) Florida Georgia (6-8) Louisiana	Georgia (9-12) New Mexico Tennessee Texas *Texas (Span 6)*	Arkansas North Carolina Oklahoma Virginia	Idaho Kentucky
World Languages	–	Alabama Florida Idaho	Indiana Mississippi South Carolina	Arkansas New Mexico Oklahoma West Virginia	Georgia North Carolina Tennessee	Kentucky Oregon Virginia	Idaho Louisiana
Business Education	Georgia Indiana Tennessee	Florida[2] South Carolina[2]	Mississippi[2] New Mexico North Carolina South Carolina[2]	Arkansas Idaho[2] Oklahoma	Alabama Florida[2] Louisiana South Carolina[2]	South Carolina[2]	Georgia Indiana Tennessee
Computer Education	Arkansas Idaho[2] Oklahoma	Florida Idaho[2] South Carolina[2]	Idaho[2] Mississippi North Carolina (7-12) South Carolina[2]	Idaho[2] Oklahoma	Alabama Florida Kentucky South Carolina[2]	Louisiana[2] South Carolina[2] Tennessee	Arkansas Mississippi Oklahoma
Health (H) Physical Education (PE)	New Mexico (H, PE) South Carolina (H) West Virginia (H)	Arkansas (H, PE) Florida (H, PE) Mississippi (H, PE)	Oregon (H, PE) South Carolina (PE)	Georgia (H, PE) Louisiana (H, PE) North Carolina (6-9) (H) Oklahoma (H, PE) Tennessee (H) South Carolina (PE)	Alabama (H, PE) Arkansas (H, PE) Idaho (H) Kentucky (H, PE)	Indiana (H) Louisiana (H, PE)	New Mexico (H, PE) West Virginia (H)
Family/ Consumer Science	Georgia Indiana South Carolina[2]	Florida Mississippi North Carolina	New Mexico South Carolina[2]	Idaho Oklahoma Tennessee West Virginia[2]	Alabama Arkansas Louisiana	South Carolina[2]	Georgia Indiana North Carolina
Art (A) Music (M) Drama (D) Speech (S)	Indiana (A, M) Kentucky (S) Oregon (A, M) Tennessee (A, M, D)	Alabama (A, M, D) California (A, M 6-8) Florida (A) Idaho[2] (A, M, D, S) Mississippi (S) New Mexico (A, M, D) North Carolina (A, M, D) Oklahoma (A, M, D)	South Carolina[2] (A, M, D, S) West Virginia (S)	Alabama (S) Florida (M, D, S) Louisiana (S) West Virginia (A, M)	Arkansas (A, M) Georgia (S) Tennessee (S) Texas (S 7-8)	Georgia (A, M, D) Kentucky (A, M, D) Oklahoma (S)	Idaho (A, M, D, S) Indiana (A, M) Kentucky (S) Louisiana (A, M) Mississippi (A, M, D) North Carolina (A, M, D) Tennessee (A, M, D)
Vocational/ Technical Education	Georgia Indiana Tennessee	Arkansas[2] Florida[2] South Carolina[2]	Mississippi[2] New Mexico South Carolina[2]	Idaho[2] Mississippi[2] North Carolina Oklahoma South Carolina[2]	Alabama Arkansas Florida[2] Kentucky Louisiana[2] South Carolina[2]	South Carolina[2]	Georgia Indiana Tennessee
Career/ Workforce Education	Georgia	Mississippi	New Mexico	Arkansas Idaho[2] Louisiana North Carolina Oklahoma	Louisiana	Alabama	Georgia
Driver Education	Idaho Tennessee	South Carolina	Alabama Arkansas Mississippi New Mexico	Florida Georgia Oklahoma West Virginia	Kentucky	Idaho	Tennessee

[1] 2005 bid year based on actual participation

[2] Selected titles

Technology for the Pre-K–12 Classroom

Beginning in the 2005-2006 academic year, *No Child Left Behind* (NCLB) mandates annual statewide testing in reading and math for grades 3–8. The law also requires statewide testing once in grades 10–12, as well as specialized assessments for English-Language Learners (ELL). In order to comply with these new mandates, educators are focusing more and more of their attention on bringing students up to speed and intervening where and when appropriate – both in the classroom and online via the Internet. McGraw-Hill Education has developed an extensive suite of technology-based intervention products and digital solutions that incorporates the latest technology to enhance learning for students and provides productivity tools to enhance instruction for teachers. By making instruction more individualized and targeted, educators will be able to use McGraw-Hill Education's technology-based products to fulfill the educational standards required by NCLB.

Reading intervention for grades 6–12

Jamestown Reading Navigator
www.jamestowneducation.com

The U.S. Department of Education estimates that 40% of all middle and high school students cannot read at a basic literacy level. *Jamestown Reading Navigator* is the first online reading intervention program built specifically for students in grades 6–12 that fully integrates the latest research in adolescent literacy. Designed to accelerate growth in reading fluency and comprehension skills, *Jamestown Reading Navigator* helps struggling students catch up to where they need to be.

- Provides online instruction, print resources, and progress monitoring
- Continuously assesses student progress, adjusts instruction, and provides individualized reports
- Aligns with Federal Striving Readers grant requirements
- Integrates professional reading training and development for district staff

Enriching math instruction with fully-integrated technology

SRA Real Math
www.realmath.com

SRA Real Math is the first skills-based pre-K–6 program to use a fully-integrated suite of technology tools to enrich classroom math instruction. Online technology augments print editions and hands-on materials to provide a broader set of resources for teachers and students.

- **ePlanner**: Lets teachers plan daily, weekly, and monthly lessons that can be organized to a teacher's specific needs and correlated to state and national standards
- **eAssess**: Enables teachers to provide individualized intervention and enrichment materials to students based on their proficiency level
- **eMath Tools**: Encourages students to engage, explore, and learn by interacting with electronic number lines, multiplication tables, and more

Pre-K–3 reading program with a strong home-school technology connection

The Wright Skills™
www.wrightgroup.com

The Wright Skills reading program for pre-K–3 provides sequential and explicit daily phonics and word study instruction that includes skills practice, student assessment, program management, and at-home reinforcement of classroom lessons. The program uses technology for progress monitoring to address individual needs of students and to create a strong home-school connection.

- The online, subscription-based version enables students and parents to reinforce classroom lessons with learning activities at home. Parents can listen to their child's oral fluency readings and download progress reports
- A CD-ROM version with skill application activities and assessments correlated to print material, together with interactive decodable books, is included in each kit

New K–6 reading program meets NCLB requirements

Treasures
www.macmillanmh.com/reading/treasures.html

Treasures is a new research-based reading program for K–6 that meets all requirements of NCLB — phonemic awareness, phonics, fluency, vocabulary, and text comprehension. A variety of assessment tools help identify strengths and weaknesses, plan instruction, and meet the needs of all students. *Treasures'* Progress Reporter:

- Diagnoses and prescribes lessons for re-teaching every skill the student did not master
- Measures and reports students' results against state and local curriculum standards to assist in reporting Adequate Yearly Progress
- Provides interactive graphic and text reports to help administrators and teachers analyze progress of individual students, a whole class, a school, or an entire district

Interactive science simulations for grades 1–6

Operation: Science Quest
CD-ROM-based product

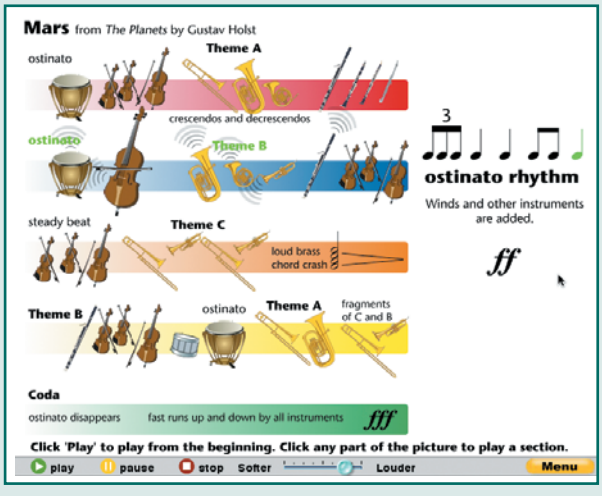
- Interactive science simulations help students in grades 1–6 understand key science concepts
- Uses a combination of animated characters, video, and interactive simulations to help students and teachers with hard-to-teach concepts
- Provides teacher reports to identify areas of student success and accomplishments
- Modules cover the three areas of science: Life, Earth, and Physical
- English and Spanish audio tracks are available as well as closed captioning

Interactive music learning for pre-K–8

Spotlight on Music™
CD-ROM-based product

Spotlight on Music™ enhances learning music through interactivity for students in pre-K–8.

- **Electronic Listening Maps** reinforce music concepts through stimulating and perfectly-timed animation to help students improve focus and learning
- **Spotlight on Orchestral Instruments** and **Spotlight on World Instruments** teach visual and aural identification of orchestral and world instruments through interactive lessons, video demonstrations, and instrument identification games
- **Music Ace**™ and **Music Ace 2**™ reinforce musical concepts and skills through lessons, games, and doodle pads of famous listening selections that help students learn pitch recognition, rhythmic patterns, harmony, and scales
- **MiDisaurus**™ features games, ear training exercises, and songs that enable children to build music literacy, develop keyboard skills, read music, and recognize music symbols



MEETING THE ASSESSMENT AND REPORTING NEEDS OF EDUCATORS, PARENTS, AND STUDENTS

The *No Child Left Behind Act* (NCLB) significantly increased the scope of the national testing market. Since the passage of NCLB, states and school districts have been developing plans to meet the law's requirements for standards, annual assessments, corrective actions, and annual state report cards.

NCLB makes the school system accountable for student achievement by requiring Adequate Yearly Progress (AYP). AYP is defined by identifying a starting point for the percentage of students performing at a certain level, then setting annual objectives and intermediate goals, with the final goal of all students reaching the proficient level. Each year states are required to disaggregate and report students' academic achievement by sub-group and must show AYP within each sub-group.

To measure a student's academic achievement, schools use assessments that fall into two categories: summative and formative.

- Summative assessments are used as an annual benchmark to measure student progress or support other high-stakes decisions such as high school exit exams.
- Formative assessments are used to ensure that teachers have the information they need in the classroom to focus instruction – so that they can begin to close the achievement gap and ensure adequate yearly student progress.

EDUCATIONAL TESTING MARKET GROWTH

NCLB requires mandatory testing in reading and mathematics in grades 3–8 and once in high school by the 2005-06 school year. In 2007-08, schools must begin testing in science at three different grade levels: 3–5, 6–9, and 10–12.

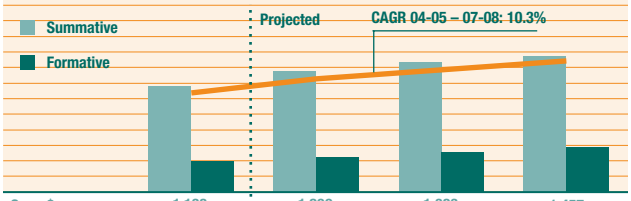
The Impact of *No Child Left Behind* on Annual Testing

Starting Year	Subject	Grades	Frequency
2005-06	Reading	3–8 10–12	Once a year Once in high school*
	Mathematics	3–8 10–12	Once a year Once in high school*
2007-08	Science	3–5, 6–9, 10–12	Once a year at three different grade levels

*Grade not specified

States and districts will require support in many aspects of assessment and accountability, particularly in benchmark testing, professional development, summative testing, and tracking student progress. As a result, the educational testing market is projected to grow to $1.9 billion by 2008-09.

K–12 Educational Testing: Projected Market Growth
(dollars in millions)



Sum. $	1,138	1,299	1,383	1,457
Form. $	330	375	425	482
Total $	1,468	1,674	1,808	1,939
Year	2005-06	2006-07	2007-08	2008-09

Source: Eduventures

A PORTFOLIO OF ASSESSMENT AND REPORTING SERVICES

MEETING EVOLVING MARKET NEEDS

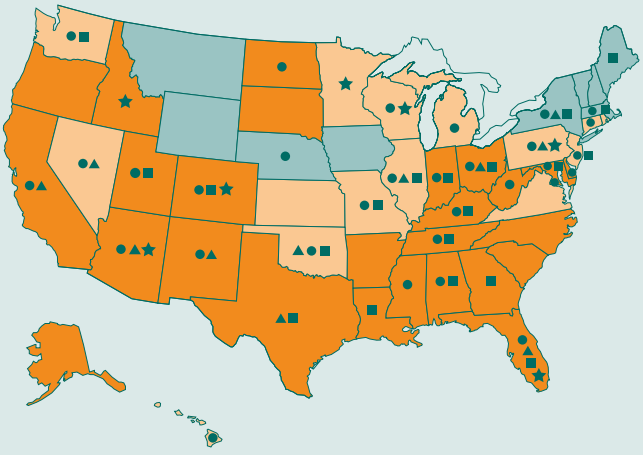
McGraw-Hill Education offers a vast portfolio of research-driven assessment and reporting solutions through its leading brands – CTB, The Grow Network, Digital Learning, and TurnLeaf – demonstrating its commitment to advancing learning through end-to-end solutions linked to rigorous standards. McGraw-Hill Education is serving and shaping the expanding education market by:

- Creating formative assessments that transform classroom learning
- Continuing to build English-language learning solutions
- Helping educators meet NCLB-driven accountability requirements

As higher learning institutions in the U.S. embrace national accountability, McGraw-Hill Education is positioned to provide educators with college readiness and post-secondary education assessments, aligned reports, systems that facilitate the use of assessment data for accreditation purposes, and professional certification and licensing.

On a global level, McGraw-Hill Education is reviewing the assessment needs of developing markets and leveraging knowledge from across McGraw-Hill to expand into new geographies. McGraw-Hill Education can help countries develop self-sustaining systems of learning linked to assessment and instruction, as demonstrated with the State of Qatar.

McGraw-Hill Assessment and Reporting Programs



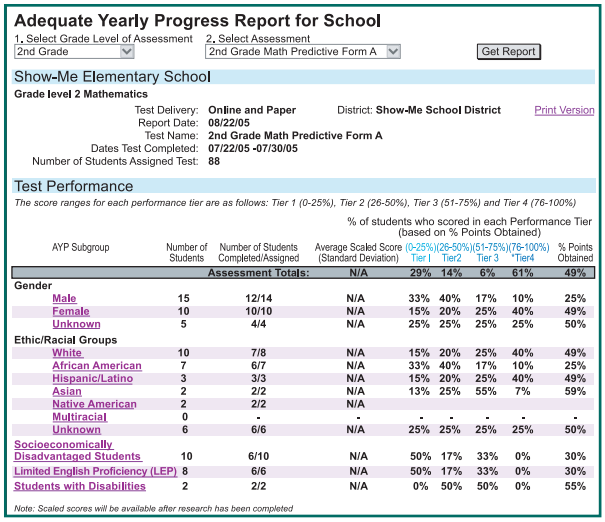
Providing Assessment and Reporting Services to Improve Learning and Instruction

Acuity

Acuity is an online assessment solution that provides immediate, actionable data on student progress to help classroom teachers create opportunities for one-on-one instruction, adhere to state learning standards, and estimate performance on NCLB tests. The product includes a suite of classroom-friendly, diagnostic benchmark assessments that mirror NCLB content in grades 3–8 and high school for math and reading/language arts. Designed in collaboration with educators nationwide, *Acuity*:

- Offers online and paper-and-pencil administration options
- Fits seamlessly into lesson plans and correlates to a district's teaching sequence
- Provides important point-in-time diagnostic data that informs instruction to help maximize student performance

Acuity is a new online assessment solution that measures student progress toward state learning standards for math and reading/language arts



Adequate Yearly Progress Report for School

1. Select Grade Level of Assessment: 2nd Grade
2. Select Assessment: 2nd Grade Math Predictive Form A
Get Report

Show-Me Elementary School

Grade level 2 Mathematics

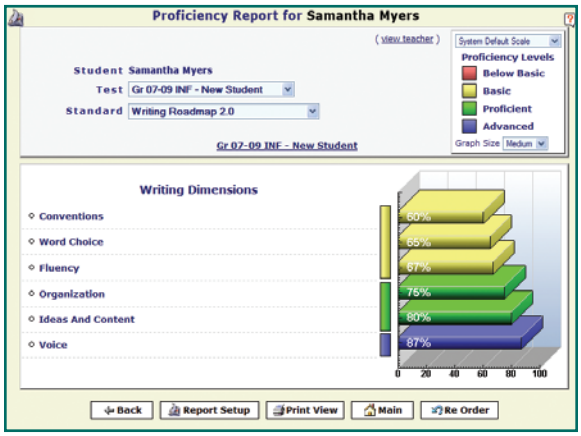
Test Delivery: Online and Paper
Report Date: 08/22/05
Test Name: 2nd Grade Math Predictive Form A
Dates Test Completed: 07/22/05 -07/30/05
Number of Students Assigned Test: 88
District: Show-Me School District
Print Version

Test Performance

The score ranges for each performance tier are as follows: Tier 1 (0-25%), Tier 2 (26-50%), Tier 3 (51-75%) and Tier 4 (76-100%)

AYP Subgroup	Number of Students	Number of Students Completed/Assigned	Average Scaled Score (Standard Deviation)	% of students who scored in each Performance Tier (based on % Points Obtained) (0-25%) Tier I	(26-50%) Tier2	(51-75%) Tier 3	(76-100%) *Tier4	% Points Obtained
Assessment Totals:			N/A	29%	14%	6%	61%	49%
Gender								
Male	15	12/14	N/A	33%	40%	17%	10%	25%
Female	10	10/10	N/A	15%	20%	25%	40%	49%
Unknown	5	4/4	N/A	25%	25%	25%	25%	50%
Ethic/Racial Groups								
White	10	7/8	N/A	15%	20%	25%	40%	49%
African American	7	6/7	N/A	33%	40%	17%	10%	25%
Hispanic/Latino	3	3/3	N/A	15%	20%	25%	40%	49%
Asian	2	2/2	N/A	13%	25%	55%	7%	59%
Native American	2	2/2	N/A					
Multiracial	0	-	-	-	-	-	-	-
Unknown	6	6/6	N/A	25%	25%	25%	25%	50%
Socioeconomically Disadvantaged Students	10	6/10	N/A	50%	17%	33%	0%	30%
Limited English Proficiency (LEP)	8	6/6	N/A	50%	17%	33%	0%	30%
Students with Disabilities	2	2/2	N/A	0%	50%	50%	0%	55%

Note: Scaled scores will be available after research has been completed



Writing Roadmap 2.0

Writing Roadmap 2.0 is an online essay scoring tool that assesses students' writing skills and teaches them to write more effectively. Designed for students in grades 3–12, its easy-to-use interface and instructional tools provide support throughout the writing process, while automatic online scoring generates instant time-saving reports. *Writing Roadmap*'s holistic reports help teachers identify instructional needs, assess student and class results, and compare those results against school and district averages. Automatic feedback is provided to the student using instructional tools. Teachers can also review essays and provide their comments.

***Writing Roadmap* assesses students' writing skills**

First Performances™

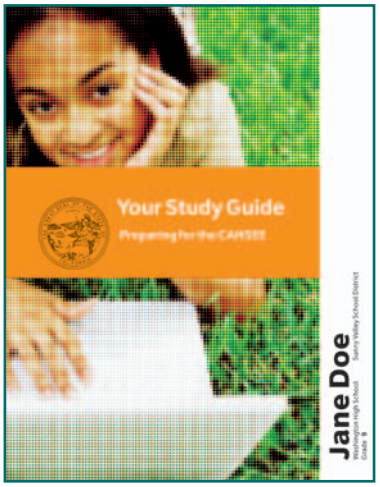
First Performances™ is a suite of observational assessments designed to help teachers measure developmental learning milestones in reading and math in pre-K–3 students. *First Performances'* assessments meet Reading First requirements, align to NCTM's *Principles and Standards for School Mathematics*, and follow NAEYC's assessment recommendations. One-on-one instruction is provided through three interconnected products:

- *Fox Letters and Numbers*™*: Pre-K Literacy and Mathematics Assessments* – Uses developmentally appropriate activities to assess a child's literacy and math progress
- *Fox in a Box*®*: K–3 Literacy Assessment* – Enables teachers to identify struggling readers by zeroing in on specific learning needs with customized activities
- *Fox Adds Up*™*: K–3 Mathematics Assessment* – Helps teachers observe and guide each child's math learning progress through engaging, targeted activities

Achievement Management System

The Achievement Management System is a powerful data tool that integrates student information systems and provides instructional alignment through assessment and reporting. This data tool complements McGraw-Hill Education's ability to provide educators at the state, district, and local levels with a broad base of reporting capabilities.

Personal Learning Program



The Personal Learning Program is a unique learning program under the Grow Network brand that transforms students' individual test data into actionable information. Customized fully to state standards, the program provides students with personalized study guides and online tutorials that build on strengths and focus on areas of need. The Governor of Texas has praised the personalized study guides for contributing to a substantial increase in exam passing rates (24 states require exit exams to get a high school diploma). *The Personal Learning Program*:

- Supports each student by providing clear feedback, targeting individual needs, and appealing to different learning styles
- Helps educators and tutors create a strong network of support for student achievement and improve classroom instruction
- Engages parents through print and online tools in multiple languages

HIGHER EDUCATION IN A KNOWLEDGE ECONOMY

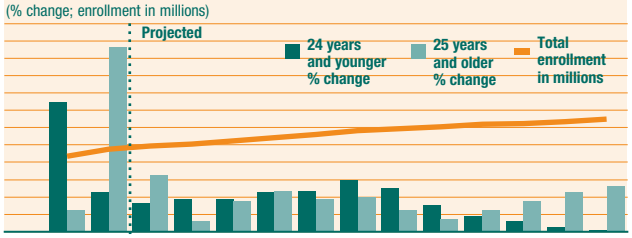
Education is a global business with steadily improving prospects fueled by the rise of the knowledge economy, the need for skilled workforces, and growing enrollments. At the same time, the convergence of content and technology is increasing technology's role in education as online courses and products attract more instructors and students. The McGraw-Hill Companies is positioned to benefit from these trends.

In U.S. higher education, there are 16 million students in more than 4,000 colleges and universities. By 2014, a record 19.5 million students will be enrolled according to the National Center for Education Statistics. Enrollments at for-profit post-secondary institutions are growing faster than the overall U.S. higher education market.

The economic value of an education is well established. According to the U.S. Census Bureau, people holding Bachelor's degrees will earn almost $1 million more over their working life than high school graduates.

Enrollment in U.S. Higher Education Institutions

(% change; enrollment in millions)

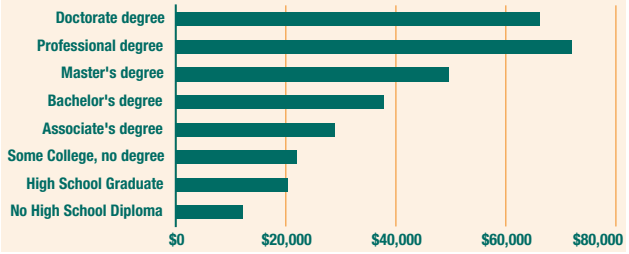


≤24 yr	6.0	1.8	1.3	1.5	1.5	1.8	1.9	2.4	2.0	1.2	0.7	0.5	0.2	0.1
≥25 yr	1.0	8.5	2.6	0.5	1.4	1.9	1.5	1.6	1.0	0.6	1.0	1.4	1.8	2.1
Total	15.9	16.6	16.9	17.1	17.4	17.7	18.0	18.4	18.6	18.8	19.0	19.1	19.3	19.5
Year	01	02	03	04	05	06	07	08	09	10	11	12	13	14

Source: U.S. Department of Education, National Center for Education Statistics, "Projections of Education Statistics to 2014"

Median Annual Earnings by Educational Attainment

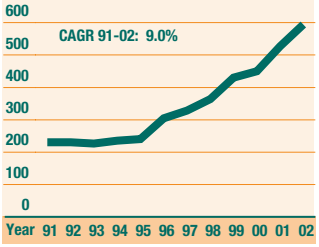
(in dollars; U.S. adults 18 years and over)



Source: U.S. Census Bureau, March 2005

Enrollment in For-Profit Post-Secondary Institutions

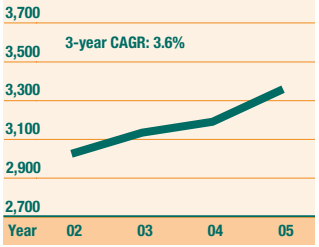
(number of students in thousands)



Source: National Center for Education Statistics, "Digest of Education Statistics 2004"

Estimated Higher Education Industry Sales of U.S. Publishers

Books and Materials (dollars in millions)



Source: AAP Includes sales of domestic and non-domestic products

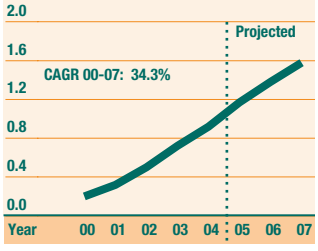
Note: Data has been restated to reflect the 2002 U.S. Economic Census

TECHNOLOGY IS ENABLING FLEXIBLE EDUCATIONAL SOLUTIONS AND OPPORTUNITIES

Digital learning solutions are making online learning one of the most dynamic segments of the higher education market. Technology is enabling busy college students and working adults to learn anytime, anywhere. Universities and online schools are meeting this demand by offering flexible educational programs ranging from single courses to postgraduate degree programs.

Enrollment in Fully-Online Distance Education

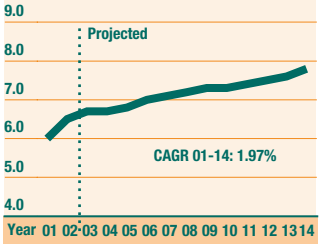
(number of students in millions)



Source: Eduventures

Adults Returning to School

(number of students in millions)



Source: U.S. Department of Education, National Center for Education Statistics, "Projections of Education Statistics to 2014"

The convergence of content and technology is leading to a new generation of products that can improve class management for instructors and enrich the learning experience for students. McGraw-Hill Education provides:

- **Online Homework and Study Tools**: Online submission of homework assignments and other drill and practice that are automatically graded for the instructor and provide instant feedback to students.
- **Online Courses**: Introduced nearly 40 online courses in 2006 that may be used as a complete course or as part of a regular course with both classroom and online instruction. Courses come with streaming video, animation, and personalized assessment.
- **Mobile Resources**: Flexible delivery of student study materials to iPods, PDAs, and other mobile devices.
- **Online Assessment**: Targets students who need help to make sure they keep pace with the rest of the class.
- **Online Content**: Updates and more current content made available after the book's publication date.

State-of-the-Art Study Aids for Online Homework

Building on the trend of anytime, anywhere learning, online homework is becoming an important component in higher education. Students benefit from online resources that complement and reinforce their classroom instruction. McGraw-Hill's interactive learning tools such as online quizzing, assessment, and tutoring provide a complete solution for students and instructors.

McGraw-Hill's Web-based homework management system links into its line of digital solutions for the higher education market. The system is purchased on a subscription basis and is branded for different courses:

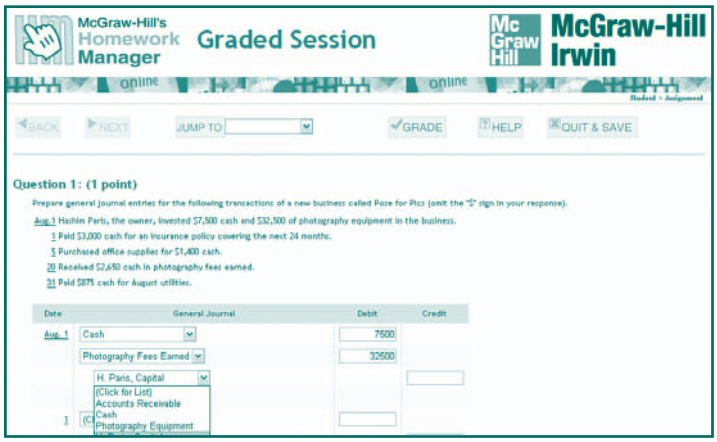
McGraw-Hill's HM PLUS™

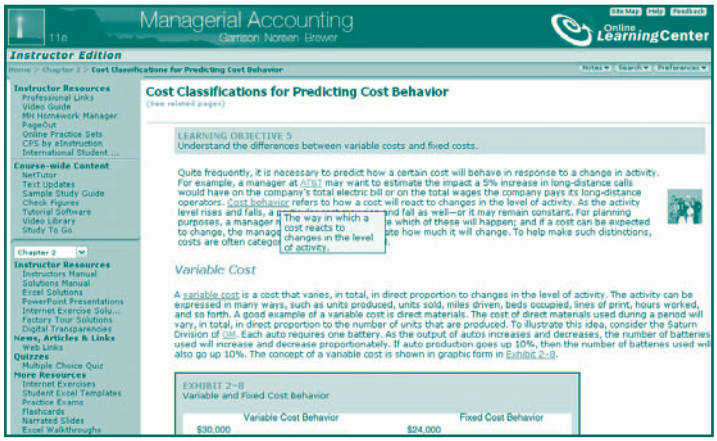
Homework Manager Plus is offered across many courses including financial and managerial accounting, business statistics, and corporate finance.

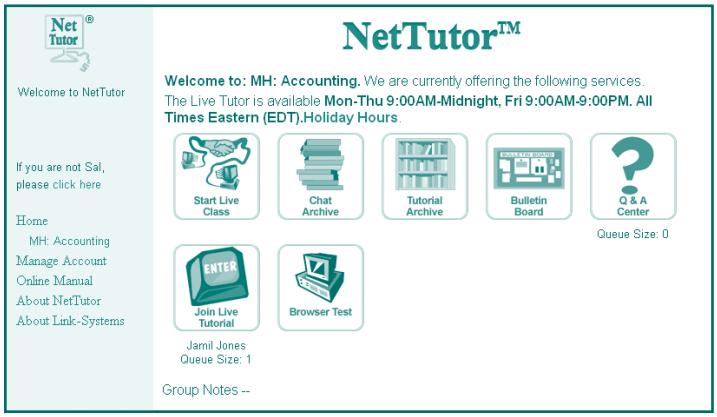
MathZone

MathZone is offered for college-level math and statistics courses.

A Complete Homework Solution







Assign Homework, Tests and Quizzes

Instructors assign homework online using either the textbook's end-of-chapter questions or an algorithmic option which generates an unlimited number of unique questions for each student.

Automatic Grading Tool

Assignments are graded automatically and the results are stored in the instructor's grade book. Instructors can determine how well each student solved individual problems or handled an assignment.

Online Practice and Instant Feedback

Algorithms provide an unlimited supply of online self-graded practice quizzes for students and instant feedback is provided during homework and study time.

Interactive Online Textbooks

Students have quick access to relevant content in the online textbook as they work through problems, exercises, and practice quizzes through McGraw-Hill's Online Learning Center, which follows the textbook chapter-by-chapter.

NetTutor™

A breakthrough program that connects students with qualified tutors online so they can receive help outside regular school hours in math, accounting, chemistry, and English composition.

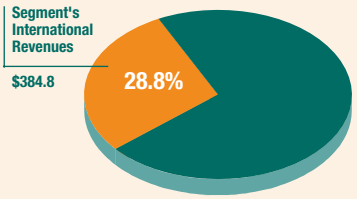
- **Live Tutor Center**: Student and tutor collaborate in real-time using a graphical white board and chat area
- **Q & A Center**: Submit questions at any time and receive answers within 24 hours
- **Tutorial Archive Center**: Browse questions and answers from other students

Growing International Sales

The Higher Education, Professional and International (HPI) Group is a multimedia provider of content to education and professional markets around the world. In international markets, the focus is on higher education, medicine, computer science, engineering, business and economics, English-language training, and selected school markets. In 2005, McGraw-Hill Education's international sales grew to $384.8 million, up 8.5% over 2004.

2005 Foreign Source Revenue*

Total Company: $1,337.8 million
(dollars in millions)



* Foreign source revenue includes international sales by U.S. operations

Higher Education: A Growing, Global Market

The worldwide demand for education is being driven by the requirements of a knowledge economy for skilled workers; growth in enrollments; and the increased use of technology, including online courses, to deliver products and services.

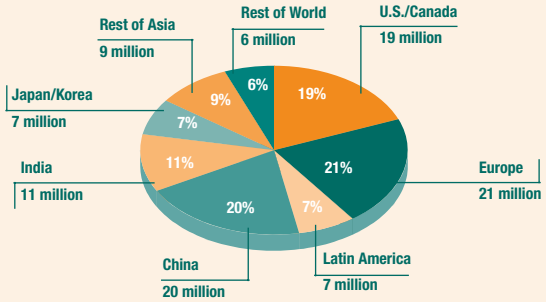
Nearly 100 million students are currently enrolled in higher education around the world. That figure is expected to increase substantially over the next 20 years stimulated by growth in worldwide population and the continued rise of emerging economies. In China, India, and Latin America, enrollments could more than double over the next two decades.

To maintain a stronger and more globally competitive workforce, the European Union launched the Bologna Process to streamline the continent's higher education system. By 2010, universities throughout the European Union will confer 3-year Bachelor's degrees and 2-year Master's degrees. This common structure will replace a multitude of specific national degrees with consistent program standards and quality and facilitate students wishing to transfer to other higher education institutions in the EU or worldwide.

In Asia, there is a strong demand for higher education, with particular emphasis on science, engineering, and business skills. Increasing enrollments in mainland China and India represent the biggest opportunities. There are particular growth opportunities in vocational education and English-language training.

Global Higher Education Enrollment – 2005

Total Enrollment: 100 million students



Sources: UNESCO, Hezel Associates

Delivering Digital Content Globally

Reflecting the globalization of higher education, the HPI Group seeks material from leading experts worldwide. For example, authors in India now provide material for the global engineering market. Online courses will also play an increasingly important role in education in emerging markets as growing enrollments outstrip the availability of traditional classrooms.

The HPI Group is taking full advantage of these global growth opportunities by focusing on key markets, including engineering, MBA, and vocational training. Digital products are gaining market acceptance as courses follow a more common curriculum and both teachers and students have better access to technology. The HPI Group provides these markets with robust, in-depth offerings of higher education and professional content. The *MBA Resource* (www.primismba.com) serves the pre-MBA, MBA, and Executive MBA markets in the U.S. and enhances the offering with relevant content from *BusinessWeek* and Standard & Poor's. The next release will serve customers in Asia, Europe, and Latin America. The engineering market is served with strong higher education content and McGraw-Hill's *Digital Engineering Library* which provides access to over 150 McGraw-Hill engineering titles online (www.DigitalEngineeringLibrary.com).

Providing Real-Time Access to Continually Updated, Subscription Content

Leveraging content, global brands, and technology, the Higher Education, Professional and International (HPI) Group is delivering new solutions anytime, anywhere to professional, medical, scientific, technical, and computer markets.

Medical

AccessMedicine (www.AccessMedicine.com), a digital subscription service, provides cross-searchable information and regularly updated content that is now used in more than 42 countries and by virtually all U.S. medical schools. *AccessMedicine* provides content at the point-of-care on a PDA and podcasts of lectures from world-renowned physicians. Subscribers have access to:

- Podcasts of weekly medical updates for iPods, MP3-compatible devices, or downloadable to the desktop
- Patient education materials
- In-depth information on over 51,000 drugs
- A differential diagnostic tool that can search by symptom, disease, or organ system
- Exam review tools powered by the best-selling series, *First Aid for the USMLE*

AccessSurgery follows the *AccessMedicine* model and combines leading McGraw-Hill reference texts with digital videos and other functionalities to provide a dedicated online resource for practicing surgeons and surgical residents. It can be purchased as a standalone subscription, or as an additional paid module within *AccessMedicine*. When it launches in August 2006, subscribers will have access to:

- More than 12,000 pages of content from leading medical texts such as *Schwartz's Principles of Surgery*
- Narrated videos of key surgical procedures
- Point-of-care information on surgical diagnosis and treatment available online or on a PDA
- 2,000 questions and answers to assist with board preparation and certification
- Updated content, videos, and journal reviews

HarrisonOnline en español (www.HarrisonMedicina.com), launched in March 2006, brings the world's best-selling medical reference, *Harrison's Principles of Internal Medicine,* 16th Edition, to Spanish-language markets and provides:

- Daily updates on recent medical advances, including information from clinical trials
- Interactive self-assessment tests
- An emergency medicine photo gallery to assist with visual diagnosis
- *Grand Rounds* lectures by *Harrison's* expert authors

Scientific and Technical

AccessScience (www.AccessScience.com) includes the contents of the *Encyclopedia of Science and Technology,* 9th Edition, and features daily science news updates and an interactive science "Q&A." *AccessScience*'s growing list of global adoptions includes the Hong Kong Public Libraries, Council of Australian University Libraries, and Ontario Council of University Libraries.

Digital Engineering Library (www.DigitalEngineeringLibrary.com) provides access to over 150 McGraw-Hill engineering titles in a fully-searchable, taxonomically-organized database. Available by subscription or pay-per-view.

Finding Growth in Our Markets

The HPI Group publishes and distributes more than 1,000 titles a year in business, health, language, science, technical, and medical fields.

Business: A market leader in finance and investment books, McGraw-Hill is expanding its personal finance line to help consumers better manage their money and investments.

Consumer: McGraw-Hill serves the growing consumer health segment through strategic relationships with Harvard Medical School and the American Diabetes Association, and through market-leading health titles for the aging baby boomer demographic.

Education: McGraw-Hill released 24 test preparation titles in 2005, up from 11 in 2004. Successful launches include *McGraw-Hill's SAT 1* with CD-ROM and *The Official Guide to the New TOEFL iBT*, the first in a series to be published in partnership with Educational Testing Service.

Professional: Building upon decades of publishing strength, McGraw-Hill is focused on globalizing its content and authorship to meet the developing needs of science, engineering, computing, and construction professionals worldwide.