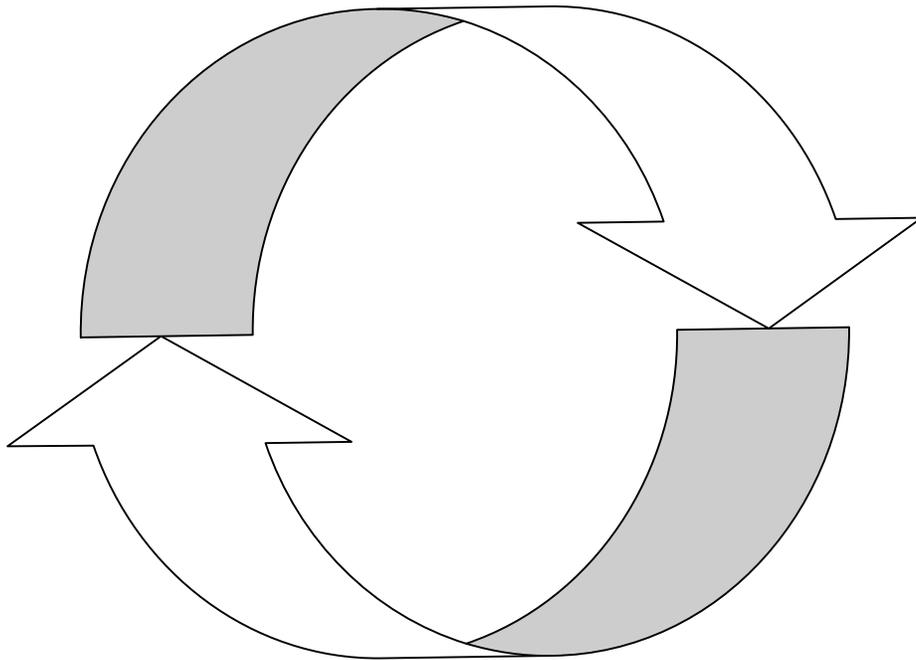


# **SCHOOL LIBRARY MEDIA CENTER**

## **LONG-RANGE PLANNING GUIDE**

**A Workbook for Massachusetts  
School Library Media Centers**



Carolyn Markuson  
Mary Frances Zilonis  
Mary Beth Fincke

## *Acknowledgments*

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Carolyn Markuson, Mary Frances Zilonis, and Mary Beth Fincke, **biblioTECH Corporation**  
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## Introduction

During the course of 1998, the Massachusetts Board of Library Commissioners (MBLC) established a Committee on School Library Planning that would act in an advisory capacity to provide guidance for the ultimate development of a planning process for school library media centers in the Commonwealth. The need for this effort by school library media centers was established in the agency's federal Massachusetts Long-Range Plan, 1998-2002 and is a requirement for schools wishing to participate in the Library Services Technology Act (LSTA) Direct Grant funding program.

In the fall of 1998, the Massachusetts Board of Library Commissioners awarded the LSTA grant for a project entitled 'Consultant for School Library Media Center Planning Project.' This project has two major objectives:

To provide a workbook for school library media specialists to assist them in the development of a long-range plan that would meet the requirements of the Massachusetts Long-Range Plan, 1998-2002, and

To prepare a training process for regional library staff to use in assisting the schools in the development of a long-range school library media center plan.

To help achieve the first major objective, six Focus Group meetings (one in each Regional Library System area) were held during the fall with school library media specialists, school administrators, and other interested parties. They provided the field input and ultimately validated much of the information gathered from state standards, national standards, and regional guidelines. Participants are listed in the acknowledgements on the previous page. In addition, participants at the state conferences for the Massachusetts School Library Media Association and the Massachusetts Computer Users and Educators were surveyed.

## Manual Organization

The manual is organized into informational chapters that correspond with the requirements of the MBLC planning process and document. Workforms are included in the chapters to which they pertain. You may want to photocopy these work forms and distribute them as a packet or individually to appropriate committee members. The Appendix contains four documents, the New England Educational Media Association (NEEMA) report on school library media competencies, a summary set of work pages, a tip sheet for survey construction, and references used in the development of this planning guide.

Carolyn Markuson

***For a sailor without a destination there is no such thing as a favorable wind***

# OVERVIEW

*Why Plan? Planning is a process having to do with determining ...*

Where you want to go

Where you are now

Ways to get from 'now' to 'then'

## ***Benefits and Characteristics of Planning***

- Explains your program to others
- Identifies priorities, strengths and weaknesses
- Provides an anchor for developing a budget
- Articulates connections with school's mission
- Provides a blueprint for future development
- Creates a clear sense of purpose
- Provides for ongoing evaluation
- Provides a basis for decision-making
- Fulfills a requirement of accreditation
- Meets the requirement for LSTA Direct Grant funds

## ***Who Should Plan?***

Long range planning for library media center programs is always a sound strategy, and anyone with the resources to develop a plan ***should*** do so.

Now, there is an additional incentive. To apply for Direct Grants for federal LSTA funds through the Massachusetts Board of Library Commissioners (MBLC) beginning in the fall of 1999, school library media centers must be members of a Massachusetts Regional Library System (MRLS) and have a long-range plan on file at the Board offices.

The MBLC will welcome and review plans from a variety of settings:

***School districts*** A district's comprehensive plan examines the district as a whole and indicates implementation by individual schools. While these plans may include library media centers that are not Regional Library System members, subsequent funding will be considered only for projects involving the centers that hold regional membership.

***Individual schools (public or private)*** that are members of a Regional Library System may develop individual planning documents or choose to develop a comprehensive plan if there are more than one library media center.

If ***two or more Regional Library System member schools within a district*** wish to group together to create a plan, the MBLC would welcome that also.

Planning requires time and commitment – for most it is a 3 - 6 month effort. While the initial year for schools' involvement in LSTA funding is 1999, should this deadline be missed, there will be an opportunity to participate in subsequent years.

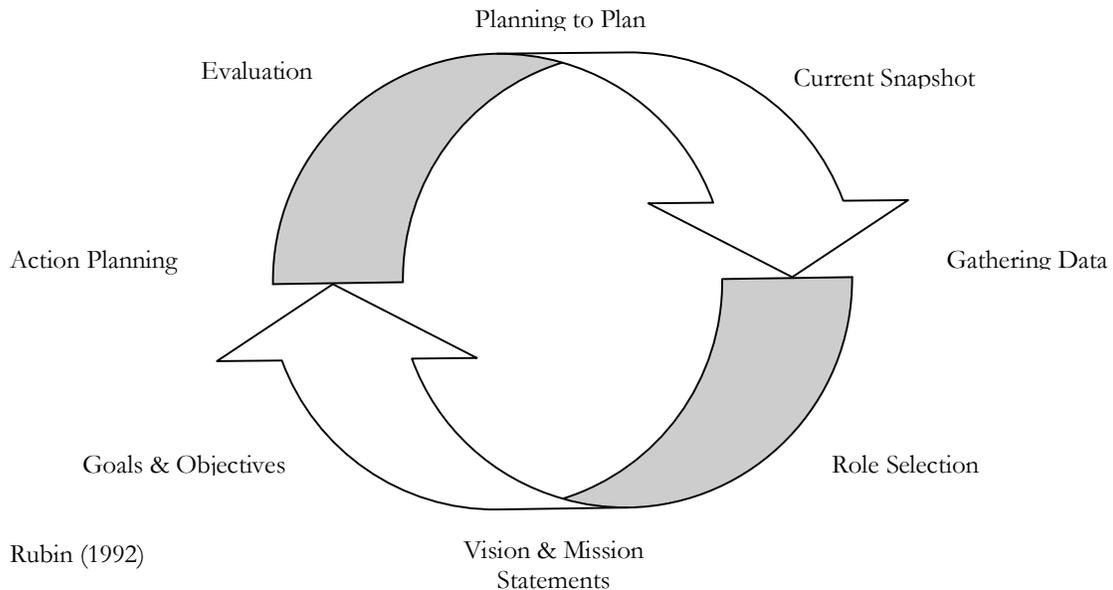
# PLANNING – WHAT IS IT

Planning is a process having to do with determining where you want to go, where you are now, and ways to get from here to there. Effective planning enables you to make decisions about the key components of your practice. It helps you articulate your vision and the process of identifying the steps you need to take to be able to arrive at your vision. This guide will help in developing both **Strategic** and **Operational** plans. The **Strategic** plan establishes a fundamental organizational tone, defines the program’s business and informs staff members why they are doing what they do. The **Operational** plan, on the other hand, is a more detailed account of specific organizational goals, often described on a year-to-year basis, with key activities identifying what will be done to meet the goals, by whom, and in what staffing configurations. Operational plans generate program output statements. These ‘outputs’ describe what conditions will exist at some determined future point as a result of the implementation of the operational plan. (LeBaron and Markuson, 1991) In order for one to be successful in implementing an operational plan, often called an **Action** plan, you need to involve as many people as possible who will be affected by the plan in the planning process.

**Both  
Strategic  
and  
Operational  
Plans  
are  
essential**

The purpose of the long-range plan is to provide an opportunity to conceptualize and describe the significant goals you wish to achieve in your school library media program within the next one to five years and to plan how to achieve these goals.

As with the development of the school district’s Technology Plan, the School Library Media Center Plan provides a system-wide framework for the program. Individual school libraries within a given district or a private school with multiple libraries may find they need to add brief additional information that will identify particular characteristics and/or position them at a particular stage in the strategic plan. In other words, the action plan for an individual school will flow from the strategic plan, but the priorities may be different for individual libraries.



# S STEP ONE

## *Planning To Plan*

### **WHO LEADS?**

In every school several potential leaders may be tapped to assume the responsibility of preparing a school library media program plan. Who is designated depends on the organizational structure of the district, availability of time to effectively lead such a project, and the role that administration decides it should take in the plan's development. Possible choices could include:

School Library Media Specialist – Library Media Coordinator – District  
Library Media Specialist – Assistant Superintendent

### **WHO IS INVOLVED?**

It is important that the planning committee represent a wide representation of interested persons, e.g. library staff, teachers, administrators, parents, and users. Consider forming a committee from the following stakeholders:

#### **STAKEHOLDERS**

Superintendent / Director	IT Coordinator
Principal / Headmaster	Parents / Library Volunteers
School Committee Member / Trustee	Students
Library Media Specialists	Public Librarian
Teachers	Curriculum Supervisors / Department Heads

While you may want to offer an open invitation to join the committee, you may find that identifying potential key members is more advantageous. You will want to select committee members who have many or all of the following characteristics:

- Knowledge of the program (or a willingness to learn quickly)
- Time to devote to the project
- A commitment to the planning process
- Political influence
- Communication and/or writing ability
- Willingness to advocate for the plan

Consider how you will involve them. Remember that you will want the committee to ‘own’ the document once it is written and those individuals who are involved are more apt to take ownership. While you will want a broad cross section of members, remember also that the larger the committee the more time is consumed in discussion, input, assembling, obtaining consensus, identifying meeting dates, etc. The time frame under which you are working will, in some ways, determine the size of the committee. Prepare a letter, memo, or a phone call of invitation, explaining how and why it is important for the invitee to join your team. *Workform 1.1 and 1.2 at the end of this chapter will help in this process.*

Prior to a first meeting:

- Clearly define the role of the committee (Advise? Approve? Prioritize? Identify goals and objectives?)
- Formulate a draft of an estimated timeline, including a proposed termination date
- Think about how many meetings will be involved (group, sub-committee, via email, virtual meetings, etc.)
- Create an agenda
- Provide possible meeting dates, times and locations for meetings
- Collect on-hand information about the library program
  - e.g. library handbook, policies and procedures, collection inventory and/or analysis, copies of communications such as newsletters, and the Technology Plan, etc.

### **Brief Description of Plan’s Methodology.**

This section identifies the specifics of the planning process. It informs the reader about how you chose to develop the plan. If you are using the process outlined in this planning document, please refer to it as the *School Library Media Center Long-Range Planning Guide*. It has been prepared for Massachusetts school library media center planning under the auspices of the Massachusetts Board of Library Commissioners by the biblioTECH Corporation, Fall 1998.

### **Questions that may help you focus your thoughts.**

What is the primary purpose of planning for your library at this time?

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Who would be the best committee members? (Names, addresses, phone numbers)

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How will you keep everyone informed? (memos, presentations, brief reports, minutes of meetings, etc. )

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Can some committee members best contribute by phone or email rather than attend meetings?

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List the resources you will need for a successful planning process. Include supplies, materials, advice, assistance, etc.

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What is the time frame? The plans and/or updates are due October 1 in order to apply for LSTA grants.

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## HOW COMPLICATED DOES THIS HAVE TO BE?

This manual is designed to provide the necessary information, examples, forms, and lists of resources that will provide options for you as you begin the planning process. It is wise to keep it as simple as possible and you may decide that some of the forms in this manual are not necessary in your situation. You will need to decide early in the process whether you need some outside assistance. Your Regional Library System's staff will provide this. Be sure to keep them informed as to your progress and feel free to ask for help if you get stuck.

## WHAT DOES THE PLAN HAVE TO INCLUDE?

The plan must include all of the following elements:

- Brief description of the plan's development and methodology
- Community scan and demographics
- A Library Mission statement
- Current status – Where are we now (needs assessment)
- Multi-year goals and objectives
- Action plan for at least the first year
  - Activities with specific time frames
  - Measures to determine progress
- Approval of the appropriate governing body
- An annual update of the action plan (at the end of each year of operation)

## THINGS TO CONSIDER AND ANSWER BEFORE YOU BEGIN

Have you read *Information Power: Building Partnerships for Learning*? What did you learn from it to help you in thinking about your program? How can it help you to educate your school community about the modern role of the library media program?

Have you visited some exemplary school library media programs to explore what your school community might be able to replicate?

What role can the library media program play in the implementation of the Massachusetts Curriculum Frameworks?

Who should be involved in your school library media center long-range planning?  
How do you get them involved?

Do you have community businesses that could be involved? How could you get them involved?

Would the services of a consultant be useful in helping to educate the school community to the needs of the library media center program?



**Letter of Invitation for Committee Members**

The \_\_\_\_\_ School District wants to develop and maintain quality library media services to meet the needs of our students and the school curriculum under the guidelines of the state Frameworks. To that end, school library media centers across the Commonwealth are embarking on a process to develop a three-to-five year plan.

Because we want to achieve broad participation in the development of this long-range plan for \_\_\_\_\_ School, I am inviting representatives of the school community and staff to join me on the committee. You have been identified as someone who would be able to make a substantial contribution to this effort and be a valuable member of the committee.

The planning committee will assist me in evaluating the current performance of the library media center, studying the library media center's current status, developing goals and objectives in accordance with other planning activities in the system and prioritizing the library media center roles for the future. The committee will also approve the resulting mission statement, long-range plan, and a year-one action plan based on the long-range plan.

## WORKFORM 1.3

## INITIAL SUPPORT LETTER

Dear \_\_\_\_\_

Date

An extraordinary opportunity has arisen for school library media centers in Massachusetts! As part of the vision of the Massachusetts Board of Library Commissioners (MBLC), six new multi-type Regional Library Systems have been established across Massachusetts, providing services and resources heretofore unavailable to schools. These six Regional Systems are now offering training and assistance to school library media centers that are regional members to develop long-range plans so that they may take advantage of the Library Services and Technology Act (LSTA) federal grant program. A comprehensive workbook has been developed, and key Regional Library System staff members have been trained specifically to help schools with the development of the plan.

The MBLC has long been responsible for the distribution of federal Library Services and Technology Act funds through a process of competitive grants. Starting in the fall of 1999, they are encouraging school library media centers to apply for such grants. Part of the application process requires the library to have a long-range plan. The MBLC will welcome a plan from individual schools, groups of schools within the system, or from districts.

During the course of 1998, over 100 school library media specialists, computer educators, principals, superintendents, school committee members, and trustees participated in meetings across the state to assist in the development of a guide/workbook and training program to help schools develop a long-range plan.

As you are aware, planning presents an opportunity for the library media center program to construct a clear sense of purpose, provide a basis for decision-making, fulfill a requirement for NEASC accreditation, and evaluate all facets of their programs.

Your support of this effort on behalf of your library media centers is essential for its success. Good planning takes time, something that is always in short supply. The library media specialist(s) and other key faculty in your *[building, system, or school]* will need to make time to work on the planning committee. Your endorsement of this project would be most welcome. Please call if you have any questions.

Respectfully yours,

**WORKFORM 1.4**

**WHO SHOULD ...**

<b>Planning Task</b>	<b>Committee Chair</b>	<b>Committee Member</b>	<b>Library Coordinator</b>	<b>Librarian / LMS</b>	<b>Key Staff</b>	<b>Parent / Volunteer</b>	<b>Other</b>
Read the preliminary documents							
Select the Planning Committee							
Prepare to Keep Stakeholders Informed – Communication Plan							
Develop a Planning Budget							
Set the Planning Timetable							
Orient the Planning Committee							
Articulate a Library Media Center Vision							
Do Community Scan / Adapt from Technology Plan							
Identify School Community Needs							
Conduct Library Scan of Current Status							
Identify Which Community Needs Should Be Addressed							
Write a Library Vision Statement							
Write a Library Mission Statement							
Determine Communication Plan to Inform Stakeholders as the Planning Process Progresses							

(Cont'd.)

**WORKFORM 1.4**

**WHO SHOULD ... cont'd.**

	Committee Chair	Committee Member	Library Coordinator	Librarian / LMS	Key Staff	Parent / Volunteer	Other
<b>Planning Task</b>							
Set Goals							
Develop a List of Objectives for Each Goal							
Review Measurement and Evaluation Techniques							
Develop a List of Resources Available/Needed							
Craft a List of Activities Needed to Meet Objectives (Action Plan Items)							
Determine Staffing /Resource /Facilities Requirements to Implement Action Plan							
Compile a Draft of the Plan							
Communicate Draft to Stakeholders							
Amend Draft to Create Final Planning Document							
Obtain Final Approval							
Publish and Distribute the Final Plan							

Completed by \_\_\_\_\_ Adapted and reprinted with permission (Himmel, 1998)

Library Name \_\_\_\_\_ Date Completed \_\_\_\_\_

**WORKFORM 1.5**

**PLANNING CALENDAR  
& TASK ASSIGNMENTS**

TASK	Assigned to (Person)	MONTHS											
		1	2	3	4	5	6	7	8	9	10	11	12
Read the preliminary documents													
Select the Planning Committee													
Develop a Planning Budget													
Set the Planning Timetable													
Prepare for Keeping Stakeholders Informed – Communication Plan													
Orient the Planning Committee													
Articulate a Library Media Center Vision													
Do Community Scan/Adapt Technology Plan’s Scan													
Identify School Community Needs													
Conduct Library Scan of Current Status													
Identify Which Community Needs Should Be Addressed													
Write a Library Vision Statement													
Write a Library Mission Statement													
Determine Communication Plan to Inform Stakeholders as the Planning Process Progresses													

(Cont'd.)

**WORKFORM 1.5**

**PLANNING CALENDAR &  
TASK ASSIGNMENTS *cont'd.***

TASK	Assigned to (Person)	MONTHS											
		1	2	3	4	5	6	7	8	9	10	11	12
Set Goals													
Develop a List of Objectives for Each Goal													
Review Measurement and Evaluation Techniques													
Develop a List of Resources Available/Needed													
Craft a List of Activities Needed to Meet Objectives (Action Plan Items)													
Determine Staffing/Resource/Facilities Requirements Needed to Implement Action Plan													
Compile a Draft of the Plan													
Communicate Draft to Stakeholders													
Amend Draft to Create Final Planning Document													
Obtain Final Approval													
Publish and Distribute the Final Plan													

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Completed by \_\_\_\_\_ Library Name \_\_\_\_\_

Date Completed \_\_\_\_\_

# WORKFORM 1.6

# PLANNING PROCESS BUDGET

Budget Category	Number	Estimated Unit Cost	Cost
<b><u>Example</u></b>			
Refreshments for Committee Meetings	8	\$ 20.00	\$160.00
Committee Support			
Planning Materials	_____	_____	_____
Resources	_____	_____	_____
Photocopies (Minutes, Orientation Documents, Workforms, draft plan, etc.)	_____	_____	_____
Postage	_____	_____	_____
Refreshments	_____	_____	_____
Supplies	_____	_____	_____
Information / PR	_____	_____	_____
Other	_____	_____	_____
Consultants/Facilitators			
Fees	_____	_____	_____
Travel expenses	_____	_____	_____
Staff Expenses			
Substitutes	_____	_____	_____
Secretarial Assistance	_____	_____	_____
Printing the Plan			
Final Plan	_____	_____	_____
Promotional Materials	_____	_____	_____
		<b>TOTAL</b>	_____

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**WORKFORM 1.7**

**COMMUNICATION PLAN**

<b>Concept / Information to be Shared</b>	<b>When</b>	<b>By Whom</b>	<b>To Whom</b>	<b>Where / How</b>

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## **S**TEP TWO

# **Connecting with the School's Mission and Community**

It is essential that any plan actively support the mission of the school and meet the aspirations of the community. It is this mission that guides the development of the curriculum, defines how the school envisions the accomplishment of its vision, and establishes how the various activities and departments of the school contribute to this vision.

Key to this, in today's world, is the understanding of the Massachusetts Frameworks. These curriculum guides rest on a Common Core of Learning, and define 'curriculum' in Massachusetts. Alongside this state guideline stand the state and national standards for the profession and the New England Association of Schools and Colleges accreditation documents, which provide an additional frame of reference for action within the profession.

Documents that can assist in the understanding of the school's mission are the NEASC Philosophy statements. These are developed for high school accreditation self-studies and articulate the aspirations of the secondary school community for its learners. While middle and elementary schools may not have similar documents, a district plan could find the high school's work instructive to the process.

In addition, schools that have participated in the funding for technology through the state have Technology Plans on file. These five-year plans are now, or are to be shortly, in the process of being updated by districts for the next five-year period. These documents provide solid assistance in the planning for school library media centers. Many, if not most, mention the library media center program as a part of their overall information technology plan for the schools. Although few, if any, have included any meaningful detail, it is important for the School Library Media Center [Strategic] Plan to be coordinated with the school's Technology Plan.

Current Technology Plans provide necessary demographic data and a descriptive overview of the district as a whole. Individual school variations from this norm should be described in a single sheet detailing the individual differences that may influence a library media center program in a particular school building.

A community scan provides up-to-date information about the composition of your school community. It describes the community, the learners, the faculty, and the teaching strategies, and takes into account other information

### **Documents Needed:**

- **Massachusetts Curriculum Frameworks**
- **School's Philosophy Statement**
- **District Technology Plan**
- **Information Power**
- **Massachusetts School Library Media Center Standards**
- **NEASC Self-study Report**

**It is important that you know  
where you are in order to plan  
for the future.**

and technology programs in the school. You should include any special needs that your school serves, as well as any elements that make your school unique. Be sure to consult the Technology Plan in your district, since much of the work may have been done for you in that document.

## **School’s Mission and Philosophy Statements**

Summarize the school’s mission and philosophy, using the documents prepared for the NEASC accreditation. It is important that the school library media program’s mission and philosophy be closely aligned with those of the school.

## **Description of Your School Community**

Provide a brief description of the demographics of your city, town, or school community. This gives a picture of the setting in which the school functions. Information for this can be extracted from the Department of Education web page <http://doe.mass.edu>, or from the District Technology Plan. See also the Massachusetts Municipal Profiles at the state’s MAGNET website: <http://www.magnet.state.ma.us>

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## **Impact of State Testing**

Provide a brief summary of the results of state testing and the impact on the school, and, in turn, on the school library media program. These results may provide an impetus for change in a number of areas of school operation. For example, if reading scores were unsatisfactory, perhaps that should become an area for particular attention, or the scores may indicate that the skills sequence requires adjustment to assure that the information skills expected match the time frames in which they are being introduced and practiced.

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**WORKFORM 2.1**

**COMMUNITY SCAN FOR INDIVIDUAL SCHOOLS (District Plan Supplement)**

Answering the following questions will help you to develop your individual school library media center description.

How many children attend your school? \_\_\_\_\_

What grade levels does your school serve? \_\_\_\_\_

Please describe your community. Include demographics, such as population, location, total area, race and ethnicity, income distribution, educational level of the community, \$ per pupil for schools, the extent of parental involvement, etc.

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Are there any special programs in the school?

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Are there any special needs programs?

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What makes your school unique? For example, has it a special mission, special populations, or particular problems, etc.?

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Provide a brief summary of the results of state testing and the impact of testing on the community and on the school –and what the implications might be, therefore, for the school library media program.

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# STEP THREE

## Vision Statement

A vision statement is a set of words or precepts you can put together so that you are focusing on a distantly achievable goal. Vision statements address four major questions:

- Who will benefit?
- What will the benefit be?
- What is the result of the benefit?
- Why is the result of the benefit important?

A vision for the school library media center is noted in *Information Literacy Standards for Student Learning*, (ALA, 1998) as “the ability to find and use information ... the keystone of lifelong learning.” All of the activities inherent in today’s library media program are focused on providing students with the skills, knowledge, resources, and environment in which this vision can flourish. The program has moved from one of curriculum support to that of interdependence with the instructional program, to provide future citizens with the intellectual and technical skills to succeed in an information society.

<p><i>Who benefits?</i> <b>Students</b></p> <p><i>What will the benefit be?</i> <b>Efficient, effective, and astute users of information</b></p> <p><i>What is the result?</i> <b>Students will be informed, active lifelong learners.</b></p> <p><i>Why is the result important?</i> <b>Preparing contributing members of society; career success in an ever-changing global village; able to satisfy their own curiosity.</b></p>
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The results of the focus groups clearly identified two additional vision statements, one emphasizing an institutional vision and the other a rewording of the national standards which focuses on student learning. These visions were:

*School library media center programs empower the curricula and frameworks*  
**and**  
*School library media center programs promote and teach information literacy skills that encompass the ability to find, use, and evaluate ideas and information, leading to productive life-long learning.*

While a vision statement is optional for the MBLC Long-Range Plan, it is an important and integral step in the planning process.

### THINGS TO CONSIDER AND ANSWER BEFORE YOU BEGIN

What is your vision of what the library media program could be in your school?

As a result of the completion of this long-range plan, how will your situation be different three to five years from now?

What will teachers/staff members be saying or doing differently?

What will students be saying or doing differently?

# S

## STEP FOUR

## ***Essential Elements and Current Status***

### **NEEDS ASSESSMENT**

In this step, you will be assessing your school library media center's **current** situation and services first from your personal point of view and later you will have committee members do a similar assessment. It is important to recognize that divergent opinions may arise as committee members see things through a different set of lenses. The outcome of this analysis of current conditions is often called a "Needs Assessment." In order to establish a more consist assessment, the rubric provided in this section may be used.

### **ESSENTIAL ELEMENTS**

National and state guidelines provide a framework for essential elements of school library media programs. In *Information Power* (ALA, 1998) these are grouped into three major areas:

- Teaching and Learning
  - Collaborative planning and teaching
  - Individual and collaborative student inquiry
  - Information Literacy skills
  - Staff development
    - Faculty
    - Librarian
- Information Access and Delivery
  - Curriculum based collection development
  - Technological access (including resource automation)
  - Collaboration with other institutions and agencies
  - Intellectual Freedom and atmosphere for learning
- Program Administration
  - Professional staffing plus appropriate support staff
  - Facility appropriate to learning
  - Financial support
  - Communication and advocacy
    - Policies, procedures, and practice

These components are considered essential to the delivery of minimum levels of service to the school community and were validated by the findings of the regional focus groups. Rank your current school library media center in terms of these essential elements using the rubric provided at the end of this section. Give your library a **4** for **Outstanding**,

a **3** for **Satisfactory**, a **2** for **Needs Improvement**, and a **1** for each **Unsatisfactory** element. While these elements should be present in any school or district, various grade levels may place different emphasis on each element.

<b>Essential Elements</b>	<b>4</b>	<b>3</b>	<b>2</b>	<b>1</b>
Collaborative Planning and Teaching				
Individual and Collaborative Student Inquiry				
Integrated Information Literacy Skills				
Professional Growth and Development				
Curriculum Based Collection Development				
Technological Access (automation, resources)				
Collaboration with Other Institutions and Agencies				
Intellectual Freedom				
Professional Staffing & Appropriate Support Staff				
Facility Appropriate to Learning				
Financial Support				
Communication and Advocacy				

## **CURRENT STATUS**

The current status is determined by asking the question: Where are you now? This begins your analysis of the state of current practices, services, policies, procedures, staffing, and resources that will enable the program to achieve its vision. Once this baseline is established, a foundation has been built that can lead to the development of budgets, growth, and change. The library media center then can turn to various guidelines and standards to see how the current and proposed improvements overlay the expected or recommended norms.

<b>Where are you now?</b>
-------------------------------

Knowing what you have in place includes not only resources within the school department, but also resources from outside agencies, such as the public library, that are, or can be, devoted to the implementation of the proposed program. This then determines what additional services or resources are needed and the impact of these (funding, personnel, equipment, space, etc.) to make the vision a reality. You should include initial, one-time-only, and on-going costs for operating the program or implementing the change. Do not forget to include consideration of the needs relative to technology as well as the guidelines / requirements of the Americans with Disabilities Act (ADA). When ready to make suggestions, be sure to create a prioritize list of the envisioned improvements and enhancements to the program that you have identified.

## **THINGS TO CONSIDER AND ANSWER BEFORE YOU BEGIN**

What services might you be able to initiate to help increase basic literacy?

Are information literacy skills embedded within the curricula of most disciplines in your school?

What is the condition of your collection? What needs to be done to improve it?

Is the faculty involved with the library media specialist in collection development?

Is there a collection development plan in place?

Is the collection of sufficient breadth and currency to be pertinent to the school's program of studies?

Is the library media center involved with the storage and circulation of computer software?

Is the library media center involved in the record keeping required for computer software site licensing?

Has the school library media center been able to develop multicultural resources? If not should that be a priority now?

Has your school library media center been automated? How could automation enhance your school library media program?

Where is the library media center's involvement with technology? What electronic resources are available for students and staff? Is the Internet available? How is access obtained? Are teachers and students learning how to efficiently and effectively access information from electronic resources? What electronic library resources are available throughout the whole school? What are your equipment, electronic database, and software needs?

Is technology seen as a vital tool for information problem solving?

What are your space needs?

What are your renovation needs?

What are your furniture needs?

What are the staff development/training needs of the school library media specialist, of the library staff, and of the teachers and principal?

How is school release time currently used? Could it be used to help facilitate staff development in the access and use of information via the resources available in the library media center?

What is the level of parental involvement? Could parents be tapped to help with some of the needs of the school library media center?

What are the staffing levels and personnel needs to be able to carry out the tasks inherent in the type of program envisioned?

Has the library media specialist been involved in curriculum planning? If not, how could the library media specialist become involved?

Do you have an effective library media advocacy program? What would you need to do to put one in place?

## **Description of the Library Media Program**

Briefly describe your library media program as it currently exists.

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What special programs does your library media center provide?

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How do students get access to the library media center?

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How do teachers access the services of the library media center and of the library media specialist?

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Are you working on developing a flexibly accessed library media program? If yes, how?

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Is the library media specialist involved in cooperative planning with the classroom teachers?

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Is the library media specialist involved in curriculum development with the classroom teachers?

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Describe how technology is integrated into the library media program.

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Describe library media center involvement with the reading program and literacy development in the school.

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What is the budget for the school library media center? (Include breakdown by categories).

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## ASSESSMENT RUBRIC

The term rubric originated from the Latin, *rubrica*, meaning red clay. In early times, this red clay was used to mark important things ... eventually leading to red wax seals to protect the contents of written correspondence.

Rubrics provide librarians with *specific criteria* for evaluating components of the program, products (PR documents, bookmarks, bibliographies, etc.), or performance. In addition they provide a tool that *increases the consistency* of the evaluation among evaluators (teachers, librarians, administrators, students, parents, etc.) as well as *provide clear targets* for program improvement.

TRAITS SCALE	<u>Understanding</u>	<u>Frequency</u>	<u>Effectiveness</u>	<u>Independence</u>
<b>4</b>	Thorough / Complete	Usually / Consistently	Highly Effective	Independently
<b>3</b>	Substantial	Frequently	Effective	With Minimal Assistance
<b>2</b>	Partial / Incomplete	Sometimes	Moderately Effective	With Moderate Assistance
<b>1</b>	Misunderstood / Serious Misconceptions	Rarely / Never	Ineffective	Only with Considerable Assistance

Wiggins and McTighe (1998)

## RUBRIC EXAMPLE

If one were to examine each *Essential Element* to determine how the school library media center assesses its performance, you would decide which **trait** best fit the element, develop a sentence using the terminology of the trait, and then develop a statement that defines each **scale** level.

For example, using Effectiveness Trait for the Essential Element

### Collaborative Planning and Teaching

<b>TRAIT/SCALE</b>  <u>Effectiveness</u>	<b>SENTENCE</b>	<b>BENCHMARK</b>
Highly Effective  4	The LMS and teacher <u>exhibit highly effective</u> collaboration and planning on units and lessons.	The LMS and teacher co-plan units and lessons, meeting regularly in advance to identify strategies and resources.
Effective  3	The LMS and teacher exhibit <u>effective</u> collaboration and planning on units and lessons.	The LMS and teacher meet prior to the development of units, lesson plans, and class visits
Moderately Effective  2	The LMS and teacher exhibit <u>moderately effective</u> collaboration and planning on units and lessons.	The LMS and teacher do some advance planning; the teacher sends in assignments in advance of class visits.
Ineffective  1	The LMS and teacher exhibit <u>ineffective</u> collaboration and planning on units and lessons.	The LMS is not involved in the planning; classes arrive unannounced, or with little or no preparation possible on the part of the LMS

**WORKFORM 4.1**

***EFFECTIVENESS RUBRIC***

<b>TRAIT/SCALE</b> <u>Effectiveness</u>	<b>SENTENCE</b>	<b>BENCHMARK</b>
<b>Highly Effective</b>  4		
<b>Effective</b>  3		
<b>Moderately Effective</b>  2		
<b>Ineffective</b>  1		

**WORKFORM 4.2****UNDERSTANDING RUBRIC**

<b>TRAIT/SCALE</b> <u>Understanding</u>	<b>SENTENCE</b>	<b>BENCHMARK</b>
<b>Through &amp; Complete</b>  4		
<b>Substantial</b>  3		
<b>Partial / Incomplete</b>  2		
<b>Misunderstood/ Serious Misconceptions</b>  1		

**WORKFORM 4.3**

***FREQUENCY RUBRIC***

<b>TRAIT/SCALE</b> <u>Frequency</u>	<b>SENTENCE</b>	<b>BENCHMARK</b>
Usually and Consistently  4		
Frequently  3		
Sometimes  2		
Sometimes or Never  1		

**WORKFORM 4.4****INDEPENDENCE RUBRIC**

<b>TRAIT/SCALE</b> <u>Independence</u>	<b>SENTENCE</b>	<b>BENCHMARK</b>
<b>Independently</b>  4		
<b>With Minimal Assistance</b>  3		
<b>With Moderate Assistance</b>  2		
<b>Only With Considerable Assistance</b>  1		

# S

## STEP FIVE

## Mission Statement

### The Mission Statement

The mission statement represents the school library media center’s reason for being. A good mission statement should accurately explain why your school library media center exists and what it hopes to achieve in the future. It articulates the organization’s essential nature, its values, and its work. It should be free of jargon. The mission statement is the heart of the *Strategic Plan* of the school library media center. The mission statement should answer the following questions:

- What are the opportunities or needs that we exist to address? (The purpose of the organization.)
- What are we doing to address these needs? (The business of the organization.)
- What principles or beliefs guide our work? (The values of the organization.)

Information Power (1998) expresses the school library media program’s mission as “ensuring that students and staff are effective users of ideas and information.” It further notes that “this mission is accomplished

- by providing intellectual and physical access to materials in all formats
- by providing instruction to foster competence and stimulate interest in reading, viewing, and using information and ideas
- by working with other educators to design learning strategies to meet the needs of individual students.”

The focus group developed the following list of reasons why the school library media center exists, and what purposes it serves within the school community. Your school may have more to add to this list. Some items may relate more to particular grade levels or situations. The overwhelming support was for Priority Mission Statements 1 - 4, as they encompass much of the “instructional role” of the library media center program.

Priority	Purpose of LMC (Mission)
1	Provide Foundation of Skills and Knowledge for Enjoying & Using Ideas and Information
2	Empower the School’s Curriculum
3	Teach Information Literacy Strategies and Techniques to Promote Efficient and Effective Use of Information
4	Support the Mission of the School
5	Foster a Love of Reading
6	Develop Life-Long Learners
7	Foster Intellectual Curiosity
	Table continued

Priority	Purpose of LMC (Mission)	[continued]
8	Facilitate the Ever Changing Information Environment	
9	Develop Diverse Collections in Many Formats to Meet Learning Styles of Students	
10	Support Good Instruction	
11	Provide a Sanctuary for Students Needing Attention, Help, Quiet, Involvement, Intellectual Stimulation, or “Something Different”	
12	Provide Literature and Reading Guidance	

## Missions of School Library Media Center Services

The mission statements of the school library media center (SLMC) provide a focus for establishing the goals of the SLMC program of services.

The first four missions are closely related to the information society in which students live, work, and, in the future, will prosper. They also anchor the changed role of the library media center program and the role of the library media specialist in a 21<sup>st</sup> century school. These ‘Information Literacy’ skills form the backbone of knowledge about how to function in the 21<sup>st</sup> century workplace. Competencies that support this role that have been taken from the NEEMA *Final Report* (1998) can be found in *Appendix A*, under the headings of “Criteria and Indicators.”

As with all aspects of the educational process the school library media center plays a role in the empowering of the school’s curriculum. The program should be carefully crafted to follow the philosophy and dictums of the school curriculum, particularly as we move toward inquiry-based and resource-based learning environments. Carefully selected collections of resources, both in the school and accessed from external sources, support the classroom instructional activities in ways heretofore impossible. The advent of technology has made this changed teaching and learning environment possible.

The library media center program provides a degree of equity around access to technology, and as such, seeks to direct and organize both the effective and efficient use of the information. The ‘mechanical’ access to external sources is reasonably simplistic and dependent on the hardware and infrastructure investment; the ‘intellectual’ access to these same sources depends on new strategies and techniques that must be taught – they are not intuitive. This is one way that the library media center program and the school’s mission of teaching and learning become interdependent.

Again, the mechanics of teaching the decoding process in learning to read is well handled by the classroom. The joy of reading happens when children take advantage of personal choices, exploring a wide range of experiences that exposes them to fine literature and at the same time provide them with a cultural literary heritage. Whether the literatures are fact, fiction, print, visual or aural is essentially immaterial – as long as the joys of reading, viewing, listening and learning are actively pursued throughout one’s lifetime. Creating an atmosphere in which this is encouraged has become part of the library media center’s role.

With the plethora of information available, one has opportunities to explore ideas in great depth and breadth. Fostering a broad exploration into the expanding universe of information stimulates the development of a life-long intellectual curiosity.

There is no inherent stability in today's information environment. Change will accelerate, rather than diminish. The shift from a linear information model, such as a book, to a multimedia and more recently to hypertext requires new thinking and techniques, and ultimately, new ways of learning. The hypertext environment is associative rather than linear in its organization. Teaching the skills and concepts that will assist students in working productively within this new environment has become the responsibility and role of the school library media specialist.

Multilingual and multicultural collections in a wide variety of formats allow students to access ideas and concepts in ways that more closely meet their own personal learning styles. We are continually learning more about how our minds work and how students and teachers learn. Resources are being acquired to better meet the demands of a wide variety of learning styles.

Resource collections in school library media centers provide a foundation for the newer teaching techniques, such as inquiry and resource-based learning. Good instruction relies on the support from and integration of this wide information base.

The social function of the school library media center is interwoven with its instructional function. It provides a sanctuary for students needing specialized or unique attention, general assistance, or simply a place to work (sometimes a quiet place!).

The specialized knowledge of resources that the school library media specialists bring to their role within the school community provides a basis for identifying key resources to meet the goals and objectives of the faculty and students. Not only must they keep up with publishing trends and the various literatures for children, but also be able provide literature and reading guidance services to keep fellow professionals aware of what is available on a variety of topics, in what formats, as well as what choices teachers and students have in identifying quality resources that meet their needs.

## **MISSIONS**

Consider how your library media center carries out the mission statements (Purpose of the Library Media Center) above. *Refer to Workforms 5.1 and 5.2.*



**WORKFORM 5.2**

***MISSION STATEMENT EVALUATION***

Existing Mission Statement: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- Significant changes since the last planning cycle :

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- Aspects of the existing mission that are still appropriate:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- Aspects of the existing mission statement that are no longer appropriate or need to be changed:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- Recommended changes in wording the existing mission statement:

\_\_\_\_\_

\_\_\_\_\_

# S

## STEP SIX

## Goals and Objectives

It is important to establish multi-year goals and objectives as well as the measurements you will need to assess progress. It is also important to differentiate progress from movement. Often, in the busy day-to-day life of the school library media center, movement overwhelms progress. The difference is between marching in place and marching forward. They feel the same, but only one makes any real difference!

### Multi-year Projections – Goals and Objectives

In order to project where you want to be in the years ahead, it is essential that you set goals. These are the broad statements that describe the envisioned ends toward which the library media center will work over the long-term. These can be expressed from the point of view of the school library media center (management or organization), from a service point of view (services and resources), or from the student, faculty, or administrators' point of view. Goals should flow logically from the vision and mission statements. A goal is normally not measurable, may take years of planning to achieve, or may never be fully reached. However, goals will probably not change over a three to five year period. Goals define your chosen course of action for meeting the needs of your school community. The school library media center may want to establish two sets of goals:

- **Where do you want to go?**
- **What do you want to see students doing in the school library media center in the years ahead?**

- Program-oriented goals – describe components of the program of services for the faculty and students
- Management or organizational goals – describe managerial and organizational components of the library media center program.

However, it is essential to recognize that management and organizational goals are undertaken to improve the conditions for delivering program. They are inexorably linked to the ultimate end, that of providing improved programs of service to our school community.

Objectives are specific short-range statements of results to be achieved to implement a goal. Objectives begin with an action verb, deal with only one idea each, are measurable, include time frames and are attainable. An objective focuses on the 'end result,' and specifies **what** and **when**, but not **why** or **how**. Specific activities expand the detail,

- **What steps must be taken to reach the goal?**
- **What activities are in place? Need to be developed?**
- **How will they be measured?**

define the **how** and **why** it is important, **who** is charged with the responsibility for seeing it through, and under what conditions. Objectives may or may not change over a three to five-year period depending upon progress made. There are times in the life of a school when events over which one has little or no control intrude. In such cases, objectives may not meet an established time frame. In such instances, a revised objective or an extension of the time frame may be entirely appropriate. The achievement of the objectives inherently moves one closer to the stated goal. Together, the goals and objectives comprise the *Operational Plan* for the library media center.

**OBJECTIVE: What and When**

**ACTION PLAN: How, Why, and Who**

## SAMPLE GOALS & OBJECTIVES

Program Goal:

To provide a collection of resources in a variety of formats that reflects the Science and Technology Frameworks and meets the needs of the Middle School students.

Objectives:

- 1.1 By September 1999 [next school year], the science and technology collections will meet current state library media standards.
- 1.2 By September 1999 [next school year], all topics and concepts in the Curriculum Frameworks will have sufficient resources to meet 90% of the information requests of students.

Activities	Description	Timeline	Who is Responsible	Resources Req'd. Resources est.Cost	Measure
1.1	Review the Science and Technology Frameworks	End of September	Library Media Specialist	Frameworks documents from state	Report of findings
1.2	Review existing holdings against Frameworks topics and concepts	September - October	Library Media Specialist	None	Report of findings
1.3	Solicit teacher input on selections	October - November	Library Media Specialist	None	Suggested list for ordering
1.4	Expand resources on topics and concepts identified as lacking depth	October - December	Library Media Specialist	Bibliographies of recommended titles Est. \$200	Develop and order list of recommended titles Est. \$600 - \$2000

Organizational Goal:

To provide professional assistance to students throughout the day by providing an adequate number of motivated enthusiastic staff with appropriate skills and training.

Objectives:

- 1.1 By September 2000 the library will have adequate staff with appropriate skills and training to meet the needs of an inquiry-based curriculum.
- 1.2 Each staff member will have a minimum of four hours of in-house technology training that she or he will evaluate as useful.
- 1.3 By September 1999, the school library will have developed a staffing plan to meet standards.

Activities	Description	Timeline	Who is responsible	Resources Required \$ est.	Output
1.1	Analyze staffing pattern, responsibilities, and schedule	January	Library Media Specialist	None	Report of findings
1.2	Compare staffing pattern with standards guidelines	January	Library Media Specialist	None	Chart findings
1.3	Develop a staffing profile for the last 5 yrs.; consider changes in enrollment	February-March	Library Media Specialist	Previous annual reports / Interview key teachers and administrators	Timeline
1.4	Survey teachers regarding their needs: class groups; small groups, individuals	March-May	Library Media Specialist	None	Report results of summary
1.5	Develop a prototype schedule	May	Library Media Specialist	Weekly schedule	Report a summary of the schedule

Table continues on next page

Activities	Description	Timeline	Who is Responsible	Resources Required \$ est.	Output
1.6	Identify periods on schedule when no LMS is available to individual students	End of May	Library Media Specialist	None	Color code period with no professional support.
1.7	Calculate staff requirements to cover the inadequacies (if any)	June 15	Library Media Specialist	None	Document results
1.8	Review findings in light of new school year demands	End of September	Library Media Specialist	Weekly schedule – interview principal to determine changes impacting schedule	Amend report
1.9	Present to budget committee	September-October	Library Media Specialist	None	Evaluate results

## WORKFORM 6.1

## GOAL REVIEW

Goal Statement:

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- How did this goal assist in fulfilling the library's mission?

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- To what degree did this goal enable the library to fulfill its roles? Which roles, specifically does this goal address?

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- To what extent did this goal provide a basis from which library staff could write clear and measurable objectives?

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- Recommendations for revising this goal statement: *(check one)*
  - Maintain goal as currently written
  - Drop this goal
  - Revise this goal in the following manner:

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## WORKFORM 6.2

## GOALS & OBJECTIVES

Objective verbs:

establish  
improve  
provide  
reduce  
minimize  
increase

initiate  
expand  
conduct  
decrease  
introduce  
develop

### Goals checklist

- Does it describe a priority condition that the library believes is important in fulfilling its roles and mission?
- Is it stated in a declarative sentence?
- Is it free of jargon and easily understood?
- Can the benefit to the user be seen?
- Does it provide a guide for objectives and activities for the next three to five years?

### Objectives checklist

- Does it clearly support the goal?
- Does it include a date by which it must be achieved?
- Does it focus on an end result (what and when)
- Is it measurable?

### Activities checklist

- Does it provide a series of steps (method) to achieve its end?
- Does it include estimated budget impacts?
- Does it identify who is responsible?

**WORKFORM 6.3      OBJECTIVES & ACTIVITIES ASSESSMENT**

Objective # \_\_\_\_\_

- Activities used to accomplish this objective: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Were activities completed on schedule: \_\_\_\_ (yes) \_\_\_\_ (no) If no, explain below:  
\_\_\_\_\_  
\_\_\_\_\_

- Strengths and weaknesses of the activity(ies): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Evidence of the degree to which the objective was accomplished: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Factors that contributed to or hindered the accomplishment of the objectives: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

- Recommendations for this objective for the next objectives cycles: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# S

## TEP SEVEN

## The Action Plan

The action plan is a specific set of strategies or activities established to carry out an objective. It provides a vehicle to articulate the means to accomplish your goals through their objectives. It also serves to prioritize the goals, objectives, and activities – to those that are essential as well as able to be completed within a given time frame. It includes the specific tasks that will be done in a logical order, specific timelines, key events, who is responsible, and/or other measures that will determine how and when the objective is realized. The action plan provides a step-by-step guide that measures and documents the school library media center’s progress towards its goals. It enables us to identify existing strengths and make them a foundation upon which we can build change. In order to be successful in implementing an action plan, one needs to involve as many people as possible who will be affected by the plan in the planning process.

- **What key tasks/resources need to be in place?**
- **What staff needs to be assigned?**
- **Who is responsible for oversight?**
- **What is the time frame for accomplishing the objective?**

### BACKPLANNING

One technique that may be used to develop the action plan is called “Backplanning.” It is a reasonably simple device, one that is very familiar to us from our personal lives. It involves determining the end objective – preferably stated in terms of the student. For example, what will students be doing in the library media center that will demonstrate that the objective has been achieved? From this statement, one plans back toward the current situation, identifying the specifics of what has to be in place to achieve the desired results. This often leads to a three to five-year sequence to achieve the goal. A simple example would be:

Activity	Year 1	Year 2	Year 3	Objective
Provide WWW access	Plan Program	Purchase hardware	Teach WWW Search Strategies	Students will be efficient searchers on the WWW

### Questions that may help you focus your thoughts

- What materials or resources will be required?
  - Are they new or on-hand?
  - How long will it take to acquire them?
- What hardware, software, equipment is required to reliably meet this objective?

- What library staff time will be involved? Teacher time? Administrative time?
- What supplies will be needed?
- What planning time will be required?
- What special knowledge will need to be taught?
- What skills will students need to bring to this new activity?
- Who will take prime responsibility for the organization of the intermediary steps?
- Is there a cost that can be attached to this objective? If yes, what is it?
- Does the facility support this activity?  
If no, can it be rearranged to do so?
- How does this impact other activities already in place?

## **BUDGET**

Establishing a cost for achieving objectives and ultimately goals is drawn from the requirements of the objective. Every activity within a school has a cost factor associated with it. Staff time costs the organization money in the form of time; resources cost money in the form of space and upkeep. In today's world, costs can come in many forms, such as license fees, annual maintenance contracts, additional electrical power, security considerations, and the like. Some activities (objectives) can extend or expand services already in place, requiring little additional time or resource investment; others can be very costly.

## **MEASURES**

One must look at both the input measures and output measures to accurately assess whether achievement of an objective has occurred. Input measures would include such information as:

- Collection adequacy
  - In line with state Curriculum Frameworks
  - In line with district topics and teaching strategies
- Availability and reliability of hardware
- Currency of selection and acquisition policies and procedures
- Access to interlibrary loan, other collections
- Collection organization and classification accuracy
- Staffing patterns [over previous three years]
  - Professional staff
  - Clerical staff
  - Technical staff
- Fiscal support [Over previous three years]
  - Per student expenditures for resources

Output measures, also called performance measures, are twofold: quantitative and qualitative.

- Quantitative measures provide a more statistical approach and may include such measures as: circulation statistics, number of reference questions, number of

classes using the library in a given period, currency of collection (State guidelines call for 70% of the collection being less than 10 years old), number of school library media center sponsored special events, meetings, etc.

- Qualitative measures look for levels of user satisfaction with various services or activities, level of assistance provided to users, effectiveness of teaching strategies, and numerous attitudes in relation to how well the user's needs are being met.

## MEASUREMENT

There are several means of gathering information in order to assess progress toward a goal or objective. Some of these are found in comparing information to state standards, accreditation instruments, etc. Other assessments can be made by soliciting information from stakeholders and other users (or nonusers) of the services. This information can be gathered by using carefully constructed surveys or conducting interviews.

You may want to survey or interview students, faculty, administrators, or combinations of these to both chart your course and to expand the involvement of others in the planning and decision-making process. You may need to use either one or the other, and occasionally both surveys and interviews to learn:

- How important particular aspects of your program are;
- What their attitudes are on the need for, importance of, or prioritization of essential elements;
- The teacher's thoughts on ranking the list of essential elements as to each element's importance, from their point of view;
- What the curriculum leaders envision for the future of their discipline;
- Which services currently offered should be discontinued and what new ones should be added;
- How students feel the arrangement of the facility could be improved
- How/whether students or faculty use other information sources (e.g. the public library, college libraries, etc.).
- How well the teachers and administrators understand the meaning of Information Literacy. [It may be useful to use [the AASL Information Literacy Competencies](#) (1995) to determine where teachers and/or administrators are in their basic understanding of the topic.];
- How well the collection meets the needs of the assignments;
- What staff development programs to offer;

Some tips and techniques for constructing surveys and interview questions are included in the Appendix.

**WORKFORM 7.1**

***ACTION PLAN***

Goal # 1 \_\_\_\_\_

\_\_\_\_\_

	<b>Name</b>	<b>Brief Description</b>
Possible Activity One		
Possible Activity Two		
Possible Activity Three		
Possible Activity Four		

***Notes:***

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## **S**TEP EIGHT

### ***Action Plan Updates***

By October 1 of each year, the action plan should be reviewed and revised to reflect activities that will take place in the next fiscal year to achieve the long-range plan's goals and objectives. This update can be accomplished by a reactivation of the planning committee, or created internally from the measures and documentation of progress within the school. Copies of these updates will need to be attached to all copies of the original document, wherever the copies may reside.

A brief report noting progress toward goals and accomplishments of objectives should accompany the update of goals, objectives, and a revised budget reflecting the changes.

# **S**TEP NINE

## ***Approval Process***

In order to have your long-range plan approved, it will need to be presented to an appropriate governing body. In some schools, that will be the Principal, Superintendent, or Director; in others final approval will rest with School Committees or Boards of Trustees. The protocol for this process would best follow standard school, school district, or private school practice. Whatever route is chosen by your particular institution, the long-range plan needs to be ‘signed-off’ by an appropriate authority.

### **GOVERNING BOARD APPROVAL**

The signature of the school’s Principal, Superintendent, private school Director or Headmaster, and/or the School Committee or Board of Trustees indicates that they have reviewed and approved the plan.

### **PUBLISH AND DISTRIBUTE**

Once completed, the long-range plan should be photocopied or printed and distributed. Format it carefully to create an attractive, interesting document that invites reading.

The long-range plan is too important a document to be limited for use simply for LSTA grant funding. It provides a clear articulation of the library media center program in your district and school for administrators, school committees, boards of trustees, teachers, parents, and the community at large. It also includes the data and information you will need to develop budget requests that can be based on concrete program activities that enable curriculum and learning, respond to an accreditation questionnaire, or used as the foundation for the development of an advocacy program.

### **PUBLIC RELATIONS**

The ease of the approval process may depend on your having kept various constituencies informed as the plan evolved. Initiating a public relations program based on the time frame of the plan’s development may be sufficient to keep everyone informed. Newsletters, brief faculty meeting announcements, minutes of meetings, brief memos, or invitations to a preliminary (to public presentation) presentation are all avenues that should be explored for the most advantageous means at your particular institution. The cultures of organizations differ and will influence how you ‘get-the-word-out.’

# APPENDIX

**FINAL REPORT**  
**New England Educational Media Association**  
**Task Force to Develop Competencies, Questions for Evaluators, and**  
**Indicators of Quality for the School Library Media Program**

**THE SCHOOL LIBRARY MEDIA PROGRAM: PROFILE AND ALIGNMENT  
DOCUMENT**

**Criteria and Indicators**

**1. Information Literacy is an integral part of the curriculum**

*The evaluator is looking for evidence that the library technology and media program plays a critical role in teaching and learning activities*

- Information literacy skills are embedded within the curriculum of most disciplines.
- Teachers and students use the resources of the library media center for teaching and learning.
- The administration, teachers, students, and community understand and support the learning goals and objectives of the library media program.

**2. Collaborative planning and teaching**

*The evaluator is looking for evidence of coordination with classroom teachers and the promotion of information literacy skills*

- Library media specialists participate in building, district, and departmental or grade level curriculum development/assessment on a regular basis.
- Library media specialists work with teachers as instructional partners in unit development and implementation.

**3. Resource based learning experiences and environments**

- The resource collection is selected and developed cooperatively by the library media specialist and faculty to support the school's curriculum and to contribute to the learning goals of teachers and students.

- A collection development plan is in place in order to ensure that resources reflect both current and in-depth knowledge.
  - The collection is of sufficient breadth and currency to be pertinent to the school's program of studies.
  - The library media center provides adequate, appropriate space for program resources, services and activities.
- 4. Use of resources in all formats as a valid, valuable base for learning in all subject areas**
- Learning needs of all students are met through access to information and ideas located in a multi-formatted resource collection that is supported by reliable equipment, and that is also adequate or in sufficient quantity for the student population who utilize the resources.
  - Students are able to demonstrate knowledge in the use of a wide variety of resources and equipment.
- 5. Use of technology as a tool or resource to facilitate student learning**
- The program provides electronic resources and focuses on the utilization of these resources in the information literacy curriculum of various content areas.
  - Students use technology to foster inquiry and master skills necessary for an information literate, life-long learner.
  - There is evidence, through the student's ability to use technology, to solve information problems.
  - There is evidence that information literacy and technology skills have been linked in content curricula to promote the transfer of information problem solving strategies across all disciplines.
- 6. Professional growth and development**
- School Library Media Specialists participate in effective staff development to consistently update skills and knowledge – especially as they relate to information literacy issues and related technologies.
  - There is evidence that the library media specialist is aware of effective practices and current research in the area of student learning and information literacy.
- 7. Management of resources and access**
- The materials of the resource collection are included in a bibliographic control system that uses standardized formats for classification and cataloging.
  - Resources are circulated according to procedures that ensure confidentiality of borrower records and promote free and easy access for students and staff.
  - There is evidence that resources are readily accessible to students and staff because of effective acquisition and circulation policies and procedures, resource sharing, and access to electronic resources outside of the school.

- The collection is organized for maximum and effective use.
- A flexible schedule is maintained to ensure access by students and teachers at point of need.

#### **8. Advocacy**

- The program is promoted by school library media personnel who model the importance of information literacy in education, publicize available services and resources to students, staff, and the community, serve on school and district-wide committees and participate in community projects.
- There is evidence that the value of the library program to students and staff is well articulated and clearly understood by administration and faculty.

#### **9. Ethical use of ideas and information**

- The program promotes the responsible use of ideas and information through collaboration with teachers, administrators, and others in the development of policies and procedures that comply with current copyright and other laws that pertain to intellectual property.
- The program actively models the ethical use of information and information technologies in the provision of services relating to the use and/or duplication of resources in any and all formats, confidentiality of records, and equitable access.

### **Questions/Evidence of Student Learning/Library Program Interaction**

1. What evidence exists that teachers understand the interdependence and fundamental relationship between the classroom and the library program to ensure that students are information literate? (1 and 3)
2. In what ways are students able to demonstrate their proficiency in the use of a variety of print, media, and electronic resources to solve information problems and make connections across the curriculum? (4)
3. In what ways are students able to use technology to acquire information, organize information, evaluate information and present information? (5)
4. What impact/effect has the library staff's professional development had on how students are able to access, evaluate, and present information? (6)
5. Give examples of student, faculty, and community value for the library media and technology program, i.e., financial support, staffing pattern, facilities, and utilization of facility, resources and collection data. (8)

6. What evidence exists that students and others in the school (administration, faculty, and staff) are ethical users of ideas and information as it relates to the library program? For example, copyright, appropriate citation of resources, etc (9)
7. What evidence exists to show that the policies, operation, and organization of the library program support student and faculty needs? For example: Is the circulation policy fair? Can users locate what they need, when they need it? Is there a selection or collection development policy? Are the hours of operation sufficient? (7)
8. What evidence exists that teachers and library media specialists plan in collaboration to benefit student learning? (2)

Level of Collaboration Rubric:

1. There is no collaboration beyond scheduling the library.
2. The teacher requests library time and the library media specialist pulls resources for use in the library or classroom.
3. An introduction to resources is provided at the beginning of a unit; resources are pulled and a schedule determined.
4. The library media specialist plans with teachers, offering suggestions and strategies, as well as pulling resources and determining a schedule.
5. Instruction in information literacy skills or concepts is provided as a result of coplanning units or lessons with teachers, as well as the pulling of resources and determining a schedule.

**Criteria upon which questions/evidences are based**

1. Information literacy as an integral part of the curriculum
2. Collaborative planning and teaching
3. Resource-based learning experiences and environments
4. Use of resources in all formats as a valid and valuable base for learning in all subject areas
5. Use of technology as a tool or resource to facilitate student learning
6. Professional growth and development
7. Management of resources and access
8. Advocacy

## APPENDIX B

### ***SCHOOL LIBRARY MEDIA CENTER DEVELOPMENT PLAN***

(School Library Media Center Name)

(School District)

(Date)

#### **PART I. Introduction to the Planning Process**

This long-range plan was produced using the *School Library Media Center Long-Range Planning Guide*, a planning guide for school library media centers in Massachusetts. The purpose of the planning process is to help school libraries identify and analyze their school community and program needs, determine key library service activities and roles, and develop goals and objectives which will help the school library media center carry out its mission and support the mission of the school.

The \_\_\_\_\_ school library media center has undertaken the planning process for the following reasons:

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A committee (provide a list of committee members) under the leadership of \_\_\_\_\_ developed this plan. The library media specialists served as primary resource persons, gathering and analyzing data, identifying library needs, crafting survey instruments to facilitate data gathering from a wide range of interested parties, and developing assessment methods. Planning committee members assisted in sharing the work of this task.

The plan produced by this process will serve as a framework that will guide school library media center development in the schools for the next three to five years. The plan will not be static. It will be reviewed and revised each year to keep pace with the success of progress as old objectives are met and new ones evolve.

Contents of this plan include:

- Description of Plan's Methodology and Development
- Community Description
- Mission Statement (Vision Statement is optional)
- Library Needs Assessment
  - Facility, Staffing, Program, and Resources
- Goals and Objectives
- Action Plan [future years, an update]
- Approval

## SUMMARY PLANNING GUIDE

### SCHOOL LIBRARY MEDIA CENTER LONG-RANGE PLANNING GUIDE

#### PLANNING: WHAT IS IT?

Planning is a process having to do with determining where you want to go, where you are now, and ways to get from here to there. Planning enables you to reflect upon where you are now, then think about and do something about the future. Effective planning enables you to make decisions about the key components of your practice. It helps you articulate your vision and facilitates your identifying the steps you need to take to be able to arrive at your vision. In order for one to be successful in implementing an action plan, one needs to involve in the planning process as many people as possible who will be affected by the plan.

The purpose of the long-range plan is to give you the opportunity to conceptualize and describe the significant goals you wish to achieve in your school library media program within the next one to five years and to plan how to achieve these goals.

The plan must include the following components:

##### **A. Description of Your School Community:**

Describe your school community. Include in your description any special programs within the school and any groups with any special needs that your school serves. Please try to include the elements that make your school unique.

**B. Description of Library Media Program:** Please describe your library media program as it currently exists. Please be sure to include any special programs, e.g. *Electronic Bookshelf* or *Assistive technology*. Please describe your library access schedule, involvement with flexible scheduling, outreach to classes, cooperative teaching, curriculum development, integration of technology, involvement with the reading program and literacy development, and the budget for the school library media center.

**C. Vision: (Optional)** A vision statement is a set of words or precepts you can put together so that you are focusing on a distantly achievable goal. What is your vision of what the library media program could be in your school? As a result of the completion of this long-range plan, how will your situation be different three to five years from now? What will teachers/staff members be saying or doing differently? What will students be saying or doing differently?

#### **Plans must include the following elements:**

- **Brief description of plan's development and methodology**
- **Community scan**
- **Mission statement (Vision statement is optional)**
- **Current status (needs assessment)**
- **Multi-year goals and objectives**
- **Action plan (Year 1) with measures to determine progress**
- **Governing body approval**
- **Action plan updates (subsequent years)**

**D. Mission Statement:** The mission statement represents the school library media center's reason for being. A good mission statement should accurately explain why your school library media center exists and what it hopes to achieve in the future. It articulates the organization's essential nature, its values, and its work. It should be free of jargon. The mission statement should answer the following questions:

1. What are the opportunities or needs that we exist to address? (The purpose of the organization.)
2. What are we doing to address these needs? (The business of the organization.)
2. What principles or beliefs guide our work? (The values of the organization.)

Make a worksheet based on these questions. Ask staff, teachers, volunteers, students, etc. to list any words, phrases, or ideas that come to mind with respect to the library media center and these various questions. Give everyone a chance to be heard. Look for language and concepts that enjoy great repetition.

**E. Needs Statement:** Where are you now? What is it you need to go from where you are now to the realization of the vision? What resources already exist within the school department, or outside agency resources that are, or can be devoted to the implementation of the proposed program? What additional resources are needed (funding, personnel, equipment, space, etc.) to make the vision a reality? You should include initial, one-time, and ongoing costs for operating the program or implementing the change. What are the needs relative to technology? What are the needs of the library media center with regard to the Americans with Disabilities Act? What are the barriers? Outline corrective action. Prioritize.

**F. Multi-year Goals and Objectives:** Goals are broad statements describing desirable ends toward which the library media center will work over the long-term, encompassing a vision of what services should be available. A goal is not measurable and may never be fully reached, but will probably not change over a three to five year period. Together with objectives, goals define a course of action for meeting the needs of a school community. Objectives are specific short-range statements of results to be achieved to implement a goal. They define how it will be done, who will do it, and when and under what conditions. Objectives are measurable, include time frames and may or may not change over a three to five year period depending upon progress made.

**G. Action Plan:** For at least the first year of the multi-year goals and objectives develop an action plan that includes activities, with specific time-frames and /or other means for measuring progress, for achieving the objectives. The action plan enables you to articulate the means to be used to accomplish an objective including specific tasks that will be done in a given year to achieve that objective; activities should include specific timelines and/or other measures for determining when the activities will take place and how the objective will be accomplished. Indicate what is to be done and by whom, when, how, and with what resources.

**H. Brief Description of Plan's Methodology:** Here identify the specific planning process used. If you are using the process outlined in this planning document, please refer to it as the School Library Media Center Long-Range Planning Guide prepared for the Massachusetts Board of Library Commissioners by the biblioTECH Corporation, fall 1998.

**I. Approval of Governing Board:** The signatures of the committee chair, school principal, district superintendent, headmaster, and/or the chair of the school committee or board of trustees indicates that they have reviewed and approved the plan.

**J. Annual Update of Action Plans:** By October 1 of each year, the action plan should be reviewed and revised to reflect activities that will take place in the next fiscal year to achieve the long-range plan's goals and objectives.

## **SCHOOL LIBRARY MEDIA CENTER LONG-RANGE PLANNING GUIDE**

### **THINGS TO CONSIDER AND ANSWER BEFORE YOU BEGIN TO COMPLETE THE TEMPLATE**

1. Have you read *Information Power: Building Partnerships for Learning*? What did you learn from it to help you in thinking about your program? How can it help you to educate your school community about the modern role of the library media program?
2. Have you visited some exemplary school library media programs to explore what your school community might be able to replicate?
3. What services might you be able to initiate to help increase basic literacy?
4. Are information literacy skills embedded within the curricula of most disciplines in your school?
5. What is the condition of your collection? What needs to be done to improve it?
6. Is the faculty involved with the library media specialist in collection development?
7. Is there a collection development plan in place?
8. Is the collection of sufficient breadth and currency to be pertinent to the school's program of studies?
9. Is the library media center involved with the storage and circulation of computer software?
10. Is the library media center involved in the record keeping required for computer software site licensing?
11. Has the school library media center been able to develop multicultural resources? If not, should that be a priority now?
12. Has your school library media center been automated? How could automation enhance your school library media program?

13. Where is the library media center's involvement with technology? What electronic resources are available for students and staff? Is the Internet available? How is access obtained? Are teachers and students learning how to access efficiently and effectively the information from electronic resources? What electronic library resources are available throughout the whole school? What are your equipment, electronic database, and software needs?
14. Is technology seen as a vital tool for information problem solving?
15. What are your space needs?
16. What are your renovation needs?
17. What are your furniture needs?
18. What are the staff development/training needs of the school library media specialist, of the library staff, and of the teachers and principal?
19. How is school release time currently used? Could it be used to help facilitate staff development in the access and use of information via the resources available in the library media center?
20. What is the level of parental involvement? Could parents be tapped to help with some of the needs of the school library media center?
21. Would the services of a consultant be useful in helping to educate the school community to the needs of the library media center program?
22. What are the staffing requirements and personnel needs to be able to carry out the tasks required by the type of program envisioned?
23. Has the library media specialist been involved in curriculum planning? If not, how could the library media specialist become involved?
24. What role can the library media program play in the implementation of the Massachusetts curriculum frameworks?
25. Who should be involved in your school library media center long-range planning? How do you get them involved?
26. Do you have community businesses that could be involved? How could you get them involved?
27. Do you have an effective library media program advocacy program? What would you need to do to put one in place?

# SCHOOL LIBRARY MEDIA CENTER LONG-RANGE PLANNING GUIDE

## TEMPLATE

This summary template, a compilation of forms distributed throughout the guidelines, provides a framework for a long-range plan. Answers to the questions and information items contained below are to be woven into a seamless narrative that would constitute the long-range plan.

### A. Description of Your School Community

Answering the following questions will help you to develop your school library media center school community description.

1. Brief description of the city or town the school is in. This gives the picture of the broader school community. Information for this can be extracted from the Department of Education web page <http://www.doe.mass.edu>, or from the Massachusetts Municipal Profiles at the state's MAGNET website: <http://www.magnet.state.ma.us>.

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2. How many children attend your school? \_\_\_\_\_

3. What grade levels does your school serve? \_\_\_\_\_

4. Please describe both your town and your school community. Include demographics, such as population, location, total area, race and ethnicity, income distribution, educational level of the community, \$ per pupil for schools, etc.

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5. Any special programs in the school?

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6. Any special needs programs?

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7. What makes your school unique? For example, has it a special mission, special populations, etc.?

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8. Provide a brief summary of the results of state testing and the impact on the school library media center program.

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8. What makes your school unique?

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**B. Description of the Library Media Program**

1. Briefly describe your library media program as it currently exists.

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2. What special programs does your library media center provide?

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3. How do students get access to the library media center?

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4. How do teachers access the services of the library media center and of the library media specialist?

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5. Are you working on developing a flexibly accessed library media program? If yes, how?

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6. Is the library media specialist involved in cooperative planning with the classroom teachers?

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7. Is the library media specialist involved in curriculum development with the classroom teachers?

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8. Describe how technology is integrated into the library media program.

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9. Describe library media center involvement with the reading program and literacy development in the school.

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10. What is the budget for the school library media center? (Include breakdown by categories).

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**B. Mission Statement**

Answering the following questions will help you to develop your school library media center mission statement.

1. What are the opportunities or needs that the school library media center exists to address?

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2. What are we doing to address these needs?

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3. What principles or beliefs guide our work?

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4. Make a worksheet based on the above questions and ask staff, teachers, volunteers, students, etc. to list any words or phrases, or ideas that come to mind with respect to the library media center and these various questions. Look for language and concepts that enjoy great repetition. Use this area to summarize the comments made.

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5. Based on the above responses, use the space below to write your mission statement.

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**C. Vision:** A vision statement is a set of words or precepts you can put together so you are focusing on a distantly achievable goal. Answering the following questions will help you to develop your school library media center vision statement.

1. What is your vision of what the library media program could be in your school? As a result of the completion of this long-range plan, how will your situation be different three to five years from now?

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2. What will teachers/staff members be saying or doing differently?

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3. What will students be saying or doing differently?

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4. Based on the above responses, use the space below to write your vision statement.

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**D. Needs Statement:** Answering the following questions will help you to develop your school library media center needs statement.

1. What do you need to go from where you are now to the realization of the vision?

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2. What resources already exist within the school department or outside agency resources that are, or can be devoted to the implementation of the proposed program?

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3. What additional resources are needed (print, non-print resources including electronic resources, personnel, equipment, space, etc.) to make the vision a reality? You should include initial, one-time, and ongoing costs for operating the program or implementing the change.

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4. What are the needs relative to technology?

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5. What are the needs of the library media center with regard to the Americans with Disabilities Act? What are the barriers? Outline corrective action.

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6. Use the space below to **prioritize** the responses to 1 through 5 above.

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## E. Multi-year Goals and Objectives

**Goals:** Broad statements describing desirable end results toward which the library media center will work over the long-term, encompassing a vision of what services should be available. A goal is not measurable and may never be fully reached but will probably not change over a three to five year period. Together with objectives, goals define a course of action for meeting the needs of a school community.

Based on the information gathered in the previous sections, please list three goals for your library media center.

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**Objectives:** Specific, short-range statements of results to be achieved to implement a goal. They define what will be done and when. Objectives are measurable, often in terms of student behavior or demonstrated abilities. They include time frames, and may or may not change over a three to five year period depending upon progress made. Based on the goals listed in the section above, please develop the objectives needed to fulfill each goal in the spaces provided below.

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**F. Action Plan:** For at least the first year of the multi-year goals and objectives, develop an action plan that includes activities, with specific time-frames and /or other means for measuring progress, for achieving the objectives. The action plan enables you to articulate the means to be used to accomplish an objective including specific tasks that will be done in a given year to achieve that objective; activities should include specific timelines and/or other measures for determining when the activities will take place and how the objective will be accomplished. This is the detailed step-by-step plan that leads to the achievement of an objective. Indicate what is to be done, by whom, when, and with what resources.

On the following pages outline your action plan.

### **ACTION PLAN**

The purpose of the action plan is to give you the opportunity to conceptualize and describe the significant goals you wish to achieve in your school library media program within the first year, and to plan how to achieve these goals.

#### **Goal 1**

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#### **Objectives Linked to Goal 1**

##### **Goal 1. Objective 1 (For year one)**

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**Activities for Objective 1:** Below write activities for each objective and establish time lines or dates for the accomplishment of each step.

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**Assessment and Documentation for Objective 1:** Indicate below how you will assess and document implementation of objectives and activities.

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**Goal 1. Objective 2 (For year one)**

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**Activities for Objective 2:** Below write activities for each objective and establish time lines or dates for the accomplishment of each step.

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**Assessment and Documentation for Objective 2:** Indicate below how you will assess and document implementation of objectives and activities.

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**Goal 1. Objective 3 (For year one)**

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**Activities for Objective 3:** Below write activities for each objective and establish time lines or dates for the accomplishment of each step.

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**Assessment and Documentation for Objective 3:** Indicate below how you will assess and document implementation of objectives and activities.

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**Goal 2**

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**Objectives Linked to Goal 2**

**Goal 2. Objective 1 (For year one)**

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**Activities for Objective 1:** Below write activities for each objective and establish time lines or dates for the accomplishment of each step.

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**Assessment and Documentation for Objective 1:** Indicate below how you will assess and document implementation of objectives and activities.

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**Goal 2. Objective 2 (For year one)**

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**Activities for Objective 2:** Below write activities for each objective and establish time lines or dates for the accomplishment of each step.

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**Assessment and Documentation for Objective 2:** Indicate below how you will assess and document implementation of objectives and activities.

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**Goal 2. Objective 3 (For year one)**

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**Activities for Objective 3:** Below write activities for each objective and establish time lines or dates for the accomplishment of each step.

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**Assessment and Documentation for Objective 3:** Indicate below how you will assess and document implementation of objectives and activities.

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**Goal 3**

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**Objectives Linked to Goal 3**

**Goal 3. Objective 1 (For year one)**

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**Activities for Objective 1:** Below write activities for each objective and establish time lines or dates for the accomplishment of each step.

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**Assessment and Documentation for Objective 1:** Indicate below how you will assess and document implementation of objectives and activities.

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**Goal 3. Objective 2 (For year one)**

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**Activities for Objective 2:** Below write activities for each objective and establish time lines or dates for the accomplishment of each step.

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**Assessment and Documentation for Objective 2:** Indicate below how you will assess and document implementation of objectives and activities.

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**Goal 3. Objective 3 (For year one)**

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**Activities for Objective 3:** Below write activities for each objective and establish time lines or dates for the accomplishment of each step.

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**Assessment and Documentation for Objective 3:** Indicate below how you will assess and document implementation of objectives and activities.

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**Plan’s Methodology:** School Library Media Center Long-Range Planning Guide prepared for the Massachusetts Board of Library Commissioners by the biblioTECH Corporation, fall 1998.

**List of Committee Members:**

_____	_____
Name	Title
_____	_____
Name	Title
_____	_____
Name	Title
_____	_____
Name	Title
_____	_____
Name	Title
_____	_____
Name	Title

_____	_____
Signature(s) of Library Coordinator and/or Committee Chairperson	Date

**Approval of Governing Board:**

_____	_____	_____	_____
Signature of Superintendent Principal, or Director	Name of School District or Private School	Address	Date

*and / or*

_____	_____	_____	_____
Signature of School Committee or Board of Trustees Chair	Name of School District or Private School	Address	Date

## APPENDIX C

## SURVEY TIPS

Constructing good surveys is not a matter of luck. Poor surveys provide poor information, or at best, information that must be massaged into something meaningful. This introduces a great deal of bias into the responses, and nullifies the findings. To avoid this, the following tips are offered.

### WRITTEN SURVEYS

- Ask only questions that really need to be answered. Avoid inserting a question because it ‘might be interesting to know’ but is not seminal to the data you are seeking.
- **Always** pilot your survey instrument with (first) a few friends or colleagues and if major changes are suggested, re-pilot with a small group of potential responders.
- Keep the language of the question or statement simple. Avoid the use of library jargon. And, remember the age and vocabulary level of the students you are surveying. Youngest children do better with interview type surveys.
- Select respondents from a sample of individuals who you know will have meaningful input. Surveying people who ‘don’t know’ can be useful, for example, if trying to find out why teachers or students don’t use the library media center or your services since they are the participants, but under normal circumstances, either a random sample or a stratified sample will provide better information.
- If the respondent group is large (over 50), choose a ‘workable’ sample size and use an appropriate sampling technique.
  - A **random sample** is the equivalent of picking names out of a hat. You could sample certain departments, or groups (freshmen, seniors), but you would select names from a list by a) generating a list of random numbers and matching the numbers with numbers of the names on the list; or, you could select every fifth or tenth name.
  - A **stratified random sample** involves selecting a sub-group of the whole and applying random sampling techniques just to this group. For example, if you want to find out attitudes of teachers to determine whether you want to continue a particular service, you might want to exclude new teachers from the group. Another example is to select two or three members from each department rather than the whole faculty or an overall random sample of the faculty to respond. This assures all departments are represented. Or, you might want to compare the thoughts of a group of library media center heavy-users to a group of non-users and stratify your sample along these lines.
  - A **weighed random or stratified sample** involves the above, but you weight each department based on its size, influence, participation, etc. For example, if the English Department has twelve teachers and the Art Department has three, you might want more representation from the English Department and you would assign weights to each group and select numbers based on those weights. In this case, the English Department may have four respondents while the Art Department has one.
- Keep the survey as brief as possible –one side of one page, not too many questions, etc.

- Write a **brief** but persuasive cover paragraph or letter succinctly explaining why you need this information and why you think the respondent has the answers you need.
- Allow sufficient time for returns.
- Follow up with either a personal visit or a phone call to non-respondents.
- If you use ratings, be sure they are consistent and in the same order for each question. For example, Yes / No (in that order); 1 – 4 (Poor to Excellent)
- When using a Likert-type scale (1=Poor, 2=Fair, 3=Okay, 4=Good, 5=Excellent **or** 1=N/A, 2=Disagree, 3=Agree, 4=Strongly Agree, 5=Complete Agreement) plan to use at least five (5) points. If you want finer discrimination, use seven (7) points. It is normally advisable not to use less than three or more than seven points.
- Be sure to clearly anchor numbered scales, for example,
 

Minimal 1 --- 2 --- 3 --- 4 --- 5 extensive

or

1	2	3	4	5
N/A	Poor	Fair	Good	Excellent
- Be sure to clearly explain what you want the respondent to do. For example, check a box, initial the correct level, and/or circle the number.
- Use surveys sparingly, particularly if you are asking the same group of people.
- Be sure to share the results of the survey with the participants. The data gathered can provide a basis for a public relations announcement.

## INTERVIEW SURVEYS

Interviewing is another excellent survey technique, but it has additional techniques. Here are some that might help:

- Carefully craft the questions. Avoid jargon or leading questions that will ‘get the answer you want to hear.’
- Arrange the interview in advance
- Practice recording the answers for listening to again later.
- Actively listen to the response while refraining from comments, facial expressions, or other body language, that again can skew the response.
- Safeguard against interviewer bias. You want to hear ‘their’ story, not a reaffirmation of your thoughts.
- Take complete notes and use a recorder if possible.
- Assure the respondent anonymity.
- Pilot the interview with a few individuals.

## APPENDIX D

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