

Managing Our Library Collections For Information Power

Library Media
Collection Management

Assess

Acquire

Maximize Access

Maintain

Bellingham Public Schools
Bellingham, Washington



Managing Our Library Collections For Information Power

Bellingham School District Libraries

This document attempts to align current library collection management practices with the Bellingham Public Schools Instructional Materials Policy. This manual was developed in 1997 and revised in 2004.

The support materials in this manual are procedures followed by Bellingham Public School Libraries and integrate the use of the Follett Library Management System. They are intended as procedural guidelines for our school Library Media Specialists.

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1. Maximize search capabilities for users
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3. Minimize physical, intellectual and time barriers

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1. Care for library resources
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Supplementary materials:

Crewe Weeding booklet

MARC booklet available online at <http://lcweb.loc.gov/marc/umb/>

Assess – Define What You Need

- 1) Identify collection needs
 - a) Identify needs based on the school curriculum.
 - Curriculum Documents-Acquire and study current curriculum documents: program outcomes, course outcomes, unit and lesson plans; research topics.
 - EALRs-Be familiar with the content of the Washington State Essential Academic Learning Requirements (EALRs).
 - b) Identify needs based on your knowledge of the collection.
 - Keep a research project notebook or ongoing topic list of collection areas needing additional resources. See ***Curriculum Connections in the Bellingham Public Schools***.
 - Consider age and condition of materials in current collection.
 - Consider student demographics and collection balance.
 - c) Identify needs based on student and staff requests.
 - Survey students and staff for titles supporting curriculum and pleasure reading.
 - Track informal student requests and interests.
 - Collect information from staff using the ***Evaluation of Library Resources*** questionnaire.
 - d) Create a plan to systematically review each area of the collection.
- 2) Conduct an annual or bi-annual inventory of the collection to determine replacement needs, missing items and status of the collection.

Ideas for Supporting the Curriculum

Here are a few suggestions for identifying curricular areas that might need additional support in the library collection:

- Find books for next year based on teacher requests for this year.
- Work with staff members and district curriculum committees that can provide information for collection development.
- Attach sticky notes around your monitor as reminders of areas, which need attention.
- Survey teachers about units they will be teaching next year.
- Collect lists of recommended books given to students for projects; ask teacher whether assignment will be repeated and warrants support.
- Create a file or notebook page for each teacher to collect recommended books lists and materials for topics studied; make it available to other teachers doing the same units.
- Check against curriculum guides and recommended lists of curriculum support materials in review sources.
- Create a chart of project-based research activities in the school. Study where improvements can be made.

Assess -- Support Materials

Evaluation of Library Resources

Email these questions to teachers after class assignment using library resources, to improve the collection of resources. Retain copies of responses for future ordering.

Were the library / information resources adequate for your needs?

What areas or materials would you like to see improved?

Recommend any specific titles or materials for the collection.

Assess -- Support Materials

Curriculum Connections in the Bellingham Public Schools

These are some curriculum areas in the Bellingham Schools requiring resource-based student investigations. Refer to curriculum guides for more complete listings.

Elementary

Science

Weather
Electricity
Soils
Butterflies
Bees
Magnets
Properties of Materials
Food chemistry
Rocks and minerals
Solar system
Seashore
Plant Growth and Development

Health

Safety
Drugs
Human Body

Social Studies

Community
Map Skills
Pioneers
American history
Parts of the world
Biographies
Explorers
Colonization
Veteran's Day
Washington State
Northwest Coast Native Americans

Language Arts

6-trait writing

Mathematics

Math themed literature

Middle School

Language Arts

Reading, writing, speaking, viewing, listening
6-trait writing

Social Studies

Pacific Rim countries
Ancient civilization (Prehistory, Sumer, Egypt, Greece, Rome, Middle ages)
U.S. History (U.S. Geography, Colonization, Revolution, Civil War, Conflicts --usually including Holocaust, Current events, Constitution)

Science

Oceanography, ecology
Earth science, meteorology, energy
Astronomy, chemistry, biology

Curriculum Connections, cont.

High School

Science

Geologic-gravitational relationships
Volcanoes & Earthquakes
Magnets, Magnetism
Native plants
Nervous system
Bioethics
Senses
Digestion
Zoology Research paper
Biology topical research
Science non-fiction reading reports
Weather tracking by satellites
Viruses and bacteria
Astronomy, Planets, Solar system
Biomes (estuaries, wetlands, ocean ridges, etc.)

Social Studies

Community problem analysis
Decades of the 60-70-80-90's
Decades of the 20-30-40-50's
Primary Resource Position Paper
Early national period
Colonial project
Spy out Rome
Manor and Social Classes in the Middle Ages
Wall of Fame: Renaissance and Reformation
A Revolting Development: 1848 Revolts
Exploring various countries of the world
Itinerary for Washington trip: 1 week
The World of the Ancient Greeks
Washington State place names
Local, county, regional, national elected officials

Consumer Ed. & Health

Social issues research project
Diseases research project
Drugs research project

Art & Music

Artist research
Composer research

Drama

Play Production
Monologues
Play reports
Scenes

English

Satire
"Paradise Lost" creative projects
Romantic period authors
Age of Reason
Biographical and other info on 20th century authors
Shakespeare's works and life
Anglo-Saxon research project
Chaucer research & project
Early American non-fiction
Transcendentalists
Research on American poets
Research paper on a social issue
Debate on controversial issue
Poetry critique

Business Ed.

Individual company analysis
Marketing Plan
Sales training manual

Foreign Language

History of Mexico
French culture project
Dream trip PowerPoint presentation
Holidays in various countries

Inventory Guide & PHD Troubleshooting Guide

An annual inventory helps identify lost or missing items in the library collection. In the Follett inventory design, there are three categories of items in the database: marked, unmarked, and missing.

1. **Unmarked** copies - When you choose 'Begin a New Inventory' (see below), every item in your database becomes Unmarked except items that are actually checked out at the time you begin the inventory. After you've scanned everything, printing a list of unmarked books will show every item that was not scanned and is not checked out. It's important to locate as many of these unmarked items as possible prior to finalizing the inventory.
2. **Marked** copies - When you scan items into the inventory, they become marked. Copies that are checked out are also considered marked.
3. **Missing** copies - When you finalize the inventory, every copy that is still unmarked becomes missing.

Prior to Inventory

1. Schedule the PhD Dolphin+ scanners through Library Media & Technology Department.
2. Gather the necessary paperwork
 - a. Inventory directions
 - b. Scan log
 - c. Follett manual available online for Bellingham School District Librarians using administrative password.
3. Schedule your volunteers.
4. Shelf read to put the books in order on the shelves.
5. Check the equipment and software
 - a. One or more PhD Dolphin+ scanners
 - b. Proper cradle connection cable (USB or serial) – **note:** for Windows 2000 or XP machines, USB cradle and cable is recommended. For Windows 98, use serial cradle and cable.
 - c. Connect the USB or serial cables to the appropriate computer port
 - d. Charge Dolphin batteries overnight in the cradle
 - e. Warning: Do not let the Dolphin batteries run down during an inventory, as all data may be lost. Placing the Dolphin in the cradle will continue to charge the batteries.

Dolphin+ Site Setup

This step prepares the Dolphin + to recognize your school's database in order to transmit inventory data.

1. Open Follett / System Setup
2. Click on PhD tab.
3. Follow 5-step directions on screen
4. Put Dolphin on cradle. Click ON SCAN button on PhD. Main menu will appear.
5. Press F4 on Dolphin to enter setup. Press F3 and click LOAD button on computer screen. A message appears that says xmitting remote, and the com lights on screen will flash. Ready appears when it is done transmitting.
6. Your Dolphin is ready to work with your school database. Close setup menu.

Prepare the Follett Software for Inventory

*Note: This step is done once and only once - just prior to beginning the actual inventory scans. **Do NOT** repeat this procedure once you have begun your inventory.*

You must have exclusive access to the database while this "Begin" procedure is running (no Follett applications may be open at any other workstation). Once started, the process cannot be stopped.

1. Go to the Follett / Inventory
2. Finalize any previous open inventory if the begin button is grayed out
3. Select Begin. Are you sure? Yes.
4. This takes just a few minutes, depending on the size of your collection (20-25 min. for a 16,000 item collection). This step removes all the markers from any previous inventories.
5. When the process is complete, the Inventory Statistics will indicate
 - Marked (# of items currently checked out or on hold)
 - Unmarked (# of items on the shelves)
 - Missing (0 if you deleted the previously missing prior to beginning the inventory)

Scan Items on shelves with the Dolphin+

- A. Turn Dolphin+ on with On/Scan button.
- B. Clear any previous scans from the Dolphin+. At Dolphin main menu press:
 - F1 for Circ Plus menu
 - F2 for Inventory menu
 - F4 to erase INV scans.
- C. Press F1 to scan items. Scan, pressing the ON / Scan button for each barcode scanned.
- D. When Dolphin is full, or you want to download, place Dolphin on cradle and use the BKSP button to return to the Dolphin Main Menu.

Scanning tips

- Duplicate the scan log so you can keep track of which areas have been scanned, by whom, and with which scanner. This is important to avoid skipping sections or duplicating sections, particularly if you have a variety of volunteers working on the project.
- A simple floor plan of the library may be helpful, or as each shelf is scanned, attach some sort of visible marker to the shelf (in a consistent place); bright red sticky dots at the lower left corner of the shelf work well. At a glance, you can see which shelves have been scanned.
- Keep the scanner far enough away from the barcode so that the red light is wider than the barcode. When it beeps, go to the next barcode.
- Scanning from the right-hand end of the shelf to the left is faster for some people.
- Another technique is to push all the books to the back of the shelf, start at the left end, and pull each book to the edge of the shelf as it is scanned.
- If the Phd+ won't accept the barcode, press in the number (don't press the "T") and then ENTER.

Downloading scans from the Dolphin+ to Follett

Note: You will be working with menus on both the computer and the Dolphin in these steps.

1. On the computer open Follett / Inventory and click on the Remote button.
2. On the Dolphin + Main Menu, press F3.

3. On the computer screen, click “Proceed” button to begin the download of scans into Follett.
4. When downloading is complete, you will be asked if you want to save the inventory file. Yes to save. This file serves as a backup file in the \\cc40\temp directory (or other location of your choice) and may or may not be useful if a problem occurs during inventory. Most likely the file is not needed, but it doesn't hurt to save it. Delete the files at the end of inventory.
5. Close after saving. A message says, “An exception report has been generated, would you like to view?” **Say YES!** This one is *very important* to you, as it tells you which barcodes were invalid, which items were on the shelves that your system says were checked out, and indicates other problems.
6. Print this Exception Report (File/Print in the notepad text file) and deal with the problems immediately, for best inventory results.

Dealing with Exception Report Problems

The exception report shows which titles that are inactive, or were checked out during the time period between the actual scanning and the uploading of the scanner.

The exception report shows the 'problem' book/barcode and the ones on either side of it on the shelf. Take this printout to the shelves *immediately* after printing, and locate the problem item. If you do not do this troubleshooting immediately, the report is of little value. In that case, you'll rely on the list of unmarked books, which you print later.

The Follett manual shows a list of all inventory messages and what they mean.

Erasing the scanner memory

Clear any previous scans from the Dolphin+. At Dolphin main menu press:

F1 for Circ Plus menu
F2 for Inventory menu
F4 to erase INV scans.
Are you sure? <Enter> = Yes

Print a list of Unmarked Items

1. When scanning is complete, run a printout of all Unmarked Copies.

Note: Running this list during the school day may affect network functionality. Approx. time= 45 min for 16,000.

2. Open Follett/ Reports.
Select Circulation reports tab.
3. Select Inventory List by Call Number.
4. Select Unmarked.
5. Select Starting At. Be sure the first title in the database is highlighted, and press Select.
6. Select Ending At. Type zzz for the last record in the database, and press Enter. Highlight the last title and click Select.
7. Select Print.

Check the shelves and attempt to locate the materials on the list of Unmarked items.

1. As materials are found, scan them into the inventory. There are several ways to do this:
 - a. Check the book out, and then back in.
 - b. Open Follett/Inventory. Type or scan the barcode of the unmarked item.
 - c. Use Dolphin+ to scan items for future downloading.
2. The Unmarked Titles list can be reprinted and shelves can be checked occasionally before finalizing.
3. When you have found as many unmarked items as possible, it is time to finalize your inventory.

Finalize the Inventory

This process changes all the Unmarked Copies to Missing in (year). This is often done just before the final report for the year is submitted. You must have exclusive use of the database to do this process. No Follett application may be open at any other workstation.

1. Go to Follett/Inventory and select Finalize Inventory.
2. Watch screen for message stating inventory has been finalized.

Print Missing Copies after Finalizing

- i) Select Follett/ Reports/ Circulation tab.
- ii) Select Copy List by Status and set the parameters (start at 000, end at ZZZ).
- iii) Select Missing from the Copy Status pull-down menu.
- iv) Select Print.
- v) Include a copy of missing materials in your Inventory File. This report does not need to be included in the Year End report to Library Media Technology, but is for building records only.

Assess -- Support Materials
PHD Troubleshooting for Older PHD+ Scanners

Note: These directions are not necessary when using the Dolphin+ Scanners.

1. If the characters “57*>” display on the PHD+:
 - Press and hold down the <6> key until you hear three beeps. Update Menu will appear.
 - If you are updating the PHD+ select **Update PHD+**. The message “Ready to Update?” will appear and the unit is ready for you to download the PHD application.
 - If you do not wish to make any changes, select **No Changes**. This returns you to the Main Menu on the PHD+ display.

2. If the characters “68>”, “69>”, “62>”, “65>”, or “66>” display on the PHD+II:
 - Press and hold down the “6” key until “TP_” displays. Type the number “59” and press <Enter. > The following message will display: “Download.y001.2”
 - Hold down the “3” key until you hear three beeps.
 - Choose the appropriate option from the menu
 - Update PHD+. The message “Ready to Update?” appears, indicating the unit is ready for you to download the PHD application.
 - No changes. This will bring you back to the Main Menu on the scanner.

3. On the PHD+II, if it really flakes out and won’t do anything, hold YES and NO while you press and hold the on/off button for + 10 seconds. You will get “66>” on the display. Proceed as in #2 above.

Acquire -- Know How to Select and Acquire What You Need

Support materials:

Instructional Materials Policy
Instructional Materials Procedures
Reimbursement for Lost Materials
Selection Sources
Materials-Ordering Steps
Form B: Non-Basic Instructional Materials – AV Evaluation Form
Form B: Non-Basic Instructional Materials Evaluation Form
Form C: Non-Basic Instructional Materials Evaluation Form
Software Evaluation Form, parts I and II
Checklist for Processing New Materials
Adding MARC Records to Database
Request for Reconsideration of Instructional Materials

- A. Identify high-quality materials that meet district guidelines.
1. Know and understand the criteria delineated in the *Instructional Materials Policy* and the *Instructional Materials Procedures*.
 2. Peruse standard *Selection Sources*.
 3. Attend conference and workshop sessions that review new materials.
 4. Encourage teachers, students and parents to recommend new materials for acquisition.
 5. Maintain a consideration file.
 6. Accept gift and donated materials only if they meet district guidelines.
 7. Check against lists of recommended materials
- B. Select materials for purchase
1. Prioritize materials for purchase
 2. Track budget expenditures.
- C. Follow established ordering procedures.
1. Follow the *Materials-Ordering Steps*, then email your order documents to Library Media and Technology.
 2. Print a copy of the order and attach District Non-Basic Instructional Materials Evaluation Forms B, C and Software to show you have based your orders on the District selection criteria.
 - *Form B – AV*. Reviews are not available. LMS or teacher has reviewed the materials.
 - *Form B – Print materials*. Reviews are not available. LMS has reviewed the materials.
 - *Form C* – Reviews from recognized sources are noted.

3. *Software Evaluation Form & Questions for Software Selection* - Teacher or LMS has reviewed the interactive software program.
4. Reserve sufficient funds to respond to unforeseen needs and requests throughout the year.

D. Process new materials according to *Checklist for Processing New Materials* in support materials.

1. Submit Form B for all gifts and donated materials.
2. Create categories as noted in Maximize access-- Support Materials section.
3. *Add MARC Records* to the database as needed.

E. Know the procedures that a parent or guardian should follow for *Reconsideration of Instructional Materials* and the *Request for Reconsideration form*.

BOARD POLICY

INSTRUCTIONAL MATERIALS

Instructional materials shall be selected to support approved curriculum, enhance student learning, and assist students in attaining the District's performance standards.

Instructional materials constitute all materials--print, non-print, or any combination thereof--used with students. Instructional materials shall be defined by two categories:

1. **Basic Materials:** Materials which are associated with District curriculum adoptions and are adopted by the Board for district-wide use as a primary means to help students attain program outcomes.

2. **Non-Basic Materials:** All other instructional and learning resources which are selected to complement, enrich, and/or extend the curriculum, e.g., specialized materials selected to meet diverse needs or rapidly changing circumstances, teacher-selected resources for individual classes, student materials lists, library materials, and the District's media collection. The use of non-basic materials for classroom instruction is the responsibility of the teacher using them and the appropriate administrator. All non-basic materials must be selected based on Board-approved goals and program outcomes.

Selection and Adoption of Instructional Materials

The Board is legally responsible for the selection of all instructional materials used in the District. The responsibility for preparing student reading lists and for examining, evaluating and selecting non-basic materials is delegated to the professional staff of the District. Basic materials shall be adopted by the Board prior to their use in schools, except for materials authorized by the Superintendent for trial use, which may be used for a period not to exceed one school year. Materials approved for trial use shall be restricted to classes specified.

The Superintendent shall ensure that a list of all approved basic materials is maintained and available for public review.

District Instructional Materials Committee

The Curriculum Director will recommend members for the Instructional Materials Committee to the Superintendent. The Superintendent shall appoint a District Instructional Materials Committee which shall include staff and parent/community members. Appointments shall be for two year terms and are subject to approval by the Board. The Instructional Materials Committee will:

1. review and make recommendations relative to the adoption of basic instructional materials in accordance with adopted curriculum, state law, and District policy and procedures;
2. implement and monitor procedures for selecting and adopting basic instructional materials owned and used by the District;
3. encourage staff, parent/community participation and expert review when necessary in the instructional materials process;
4. review and make recommendations to the Superintendent or designee regarding requests for reconsideration of any instructional materials;
5. ensure that instructional materials recommended for adoption are selected in conformance with the criteria listed below.

Goals for Selection of Instructional Materials

The following goals will be used in the selection of all instructional materials recommended for use by District students. Instructional materials shall:

1. be consistent with District-adopted curriculum and relevant policies, procedures, and regulations;
2. support and enrich the curriculum, taking into consideration the varied instructional needs, learning styles, abilities and developmental levels of the students served;
3. stimulate student growth in critical thinking, reasoning, and problem solving and support lifelong learning and workplace applications;
4. be of sufficient variety to meet the diverse needs/characteristics of students and present balanced but differing views of issues, controversial or otherwise, in order that students may develop analytical and decision-making skills;
5. contribute to the development of an understanding of the diversity of American life by being appropriately inclusive regarding the roles and contributions of various groups and cultures;
6. contribute to the development of self-respect, pride and an appreciation of differences and reflect respect for the worth and dignity of all people;
7. offer the most appropriate format(s) (including technological, visual and/or auditory components) to support adopted curriculum; and
8. be generally free of sex bias, stereotyping, and other forms of bias. The Board recognizes that under certain circumstances biased materials may serve as appropriate resources to present contrasting and differing points of view, and biased materials may be employed in order to teach students about bias, stereotyping, and propaganda. Also, classic and contemporary literary works, periodicals, and technical journals may be selected even if they do not meet this general standard, if otherwise educationally necessary or appropriate.

Requests for Reconsideration of Instructional Materials

Parents, guardians, or custodians of District students may request removal or restricted use of instructional materials in the District. Formal, written requests to remove items from the schools, or limit their use, will be reviewed by a representative committee appointed by the Superintendent or designee. The committee will report its findings to the Instructional Materials Committee, which will make a recommendation to the Superintendent or designee for action, in accordance with procedures established by the Superintendent. Decisions of the Superintendent or designee may be appealed to the Board for final determination.

Conditions for Loan and Disposal of Instructional Materials

Free basic materials and other instructional materials may be made available for loan to students when, in the judgment of the Board, the best interests of the District will be served by such a decision. The professional staff will maintain records necessary to account for all instructional materials and provide for student replacement of lost or damaged materials. Instructional materials that do not meet current District standards for curriculum, Board-approved goals, or are not serviceable may be declared obsolete by the Superintendent and disposed of per state legal requirements.

Administrative Procedures

The Board of Directors delegates to the Superintendent the responsibility to establish procedures which support the effective implementation of this policy.

LEGAL REFERENCES:

RCW 28A.150.230	Basic Education Act-- District school directors as accountable for proper operation of district--Scope-- Responsibilities--Publication of guide
RCW 28A.320.230	Instructional materials--Instructional materials committee
RCW 28A.640.020	Regulations, guidelines to eliminate discrimination--Scope
RCW 28A.320.240	Operation and stocking of libraries
WAC 180-46-015	Library media collections
WAC 180-46-030	Equipment and materials
WAC 392-190-055	Textbooks and instructional materials

Adopted: June 26, 2003

ADMINISTRATIVE PROCEDURES**INSTRUCTIONAL MATERIALS****I. GENERAL PROCEDURES**

As specified in the Policy 2311, basic instructional materials must be approved by the Board following review and recommendation by the Instructional Materials Committee. Only materials approved by the Superintendent for trial use are excepted from this requirement. Non-basic instructional materials must be reviewed and approved by the appropriate principal or program administrator prior to purchase and use. All instructional materials must be selected and recommended based on Board-approved goals and curriculum. Each building principal and program administrator is responsible for ensuring the continuing familiarity of certificated staff with the requirements of Policy 2311 and these procedures, and for ensuring implementation in the selection of non-basic materials.

II. DISTRICT INSTRUCTIONAL MATERIALS COMMITTEE

The Instructional Materials Committee ("Committee") is responsible for the duties specified in the policy and shall function based on the following:

- A. This Committee shall consist of twelve (12) members: one (1) elementary, one (1) middle school, and one (1) high school faculty member; one (1) special education faculty member; one (1) current curriculum committee leader; two (2) school administrators; three (3) parent/community members representing elementary, middle, and high school levels; the Curriculum Director (1), who will serve as chairperson; and the Director of Library, Media and Technology (1), who will serve as the secretary. An addition of two (2) non-voting technical advisors may be added to the committee when review of materials with specialized content is required. These members will be recommended by the Director of Curriculum and approved by the Superintendent or designee.
- B. Members of the Committee shall serve for two-year terms. Terms shall be staggered so that, each year, (a) one faculty member, (b) one parent/community member, and (c) either one building administrator or the curriculum committee member will rotate off the Committee. The Superintendent may make interim appointments to replace Committee members who are unable to serve full terms.
- C. Copies of the Committee schedule will be available at the beginning of each school year. The chairperson shall provide District parents and community members with reasonable notice (e.g., through District and/or building publications) of opportunities to serve on the Committee.
- D. Materials proposed for adoption should be submitted by the Director of Curriculum to the Committee for review and recommendation no later than March of the year prior to implementation of the material.
- E. The Committee may review non-basic instructional materials at the request of teachers or administrators when submitted by the appropriate school, department, or District administrator. This procedure is recommended for specialized materials and teacher-selected resources that are used extensively throughout the District or for extended periods. The Committee will make recommendations to the appropriate administrator for the use of such materials with District students.
- F. Guest speakers/presenters who are being used to deliver a portion of the adopted school district curriculum must have their presentation, notes and handouts reviewed and approved by the Instructional Materials Committee. If approved for use in the Bellingham School District the presentation will be included on a list of approved presentations and the list will be distributed to building administrators. Significant changes in content of presentations or any changes in handouts must be resubmitted to the Curriculum Office. See Policy 2321 Community Resource Persons.
- G. After approval by the Instructional Materials Committee, recommendations for adoption of basic materials will be forwarded to the Superintendent for Board consideration and approval.

III. EVALUATING MATERIALS FOR BIAS

All basic instructional materials selected for use in the District must be evaluated using the District's *Screening Guidelines for Bias and Stereotypes* prior to purchase. Documentation of the results of these reviews shall be on file in the Curriculum Office. It is recommended that non-basic materials also be reviewed using these guidelines.

IV. PARENT AND COMMUNITY MEMBER PARTICIPATION IN THE INSTRUCTIONAL MATERIALS PROCESS

District parents and community members participate in the instructional materials selection process through representation on curriculum committees, the Instructional Materials Committee, and the Board of Directors. In addition, parents and community members are invited to review any instructional materials in current use or proposed for District purchase. Such review may be accomplished at a school or at the District administrative offices. The review should be arranged with the Director of Curriculum or appropriate building principal so as to avoid disrupting the educational program. The review of materials should be undertaken with the knowledge of relevant approved curriculum specifications.

The following activities will be employed to help parents and community members become familiar with instructional materials:

- a) Information about basic materials in use or under consideration is available to citizens at the District Curriculum Department.
- b) Displays of instructional materials may be presented in schools at PTSA meetings, parent-teacher conferences, and public meetings during the school year.
- c) Basic materials scheduled for Board consideration shall be available for preview in the District Curriculum Department for two (2) weeks prior to the scheduled Board meeting.

V. SELECTING MATERIALS FOR LIBRARY MEDIA CENTERS AND DISTRICT CIRCULATION COLLECTION

Selection of Materials for Library Media Centers

Library media materials for each building will be selected by the Library Media Specialist with support from the professional staff and the approval of the principal.

The following criteria, in addition to the goals set forth in policy 2311 for the selection of instructional materials, will be considered in the selection of library media materials:

- A. Curriculum needs of the individual school and individual student;
- B. Requests from administrators, teachers, parents, and students;
- C. Reading interests, abilities and developmental levels of students using library media centers;
- D. Date and reliability of information;
- E. Scholarship and competence of the author;
- F. Literary quality;
- G. Attractiveness and durability of the physical book/material; and
- H. Assurance of actual use.

Selection of Materials for the District Circulation Collection:

- A. The District circulation collection consists of non-basic instructional materials that, because of cost and other factors, are located in District offices and made available for circulation to schools in the District upon request. Catalogs listing the holdings of the circulation collection shall be kept current and made available to all staff members.
- B. The Director of Library, Media and Technology shall be responsible for the selection and purchase of instructional materials for the circulation collection based on recommendations of curriculum committees, administrators, and staff. To the extent feasible, instructional materials under consideration for purchase should be previewed and evaluated by at least three (3) appropriate staff members prior to acquisition.
- C. In selecting circulation collection materials, preference should be given to media or physical formats that can be utilized by the greatest number of schools within the District and that are compatible with either existing equipment or with new equipment schools are expected to acquire.

VI. REQUESTS FOR RECONSIDERATION OF MATERIALS

The District recognizes that opinions sometimes differ regarding the quality and suitability of materials and has the obligation to consider requests by parents, guardians, or custodians of District students for removal or restricted use of instructional materials. Whenever possible, such requests should be resolved informally at the classroom or school building level. If this informal process does not resolve the matter, the parent, guardian, or custodian may submit a formal Request for Consideration of Instructional Materials. The following procedures govern the submission of reviewing such formal requests:

- A. Requests must be submitted in writing on the form entitled *Request for Reconsideration of Instructional Materials* and signed by the individual making the request. Forms are available in all schools and District offices. Completed forms should be submitted to the Superintendent's Office.
- B. Upon receipt of a request form, the Superintendent or designee shall appoint an *ad hoc* committee composed of the Director of Curriculum, one administrator, two certificated staff, and two parent/community members to review the contested material. The *ad hoc* committee shall submit a written report to the Instructional Materials Committee concerning the request.
- C. The Instructional Materials Committee will review the request form and the report of the *ad hoc* committee, and any other information it deems relevant. Following this review, the Instructional Materials Committee will submit a recommended decision concerning the request to the Superintendent or designee.
- D. The person making the request shall be notified by letter of the decision by the Superintendent or designee.
- E. In the event the request is denied, the requester may appeal the Superintendent's decision to the Board for a public hearing. The request for a hearing must be in writing, signed, and delivered to the Superintendent within two weeks following issuance of the Superintendent's or designee's decision. The Superintendent will arrange a timely Board hearing. The Board's decision on an appeal is final.

VII. REIMBURSEMENT TO THE SCHOOL DISTRICT BY STUDENTS FOR LOANED MATERIALS

Reimbursement to the District by students responsible for loss or destruction of loaned instructional materials shall be determined by the following scale:

- 1st year 100% of purchase price
- 2nd year 85% of purchase price
- 3rd year 70% of purchase price
- 4th year 55% of purchase price
- 5th year 40% of purchase price
- 6th year to be determined by instructor (not to exceed 40%)

School principals have the authority to modify this payment schedule for good cause based on their judgment.

DISPOSAL OF INSTRUCTIONAL MATERIALS

Instructional materials may be removed from collections at any time that they no longer meet District standards for curriculum, Board-approved goals, or are no longer serviceable. Any instructional materials may be recommended for removal when the administration judges such removal to be in the best interests of the District. Ordinary procedures for withdrawal of materials are:

Basic materials shall be removed upon recommendation by the Director of Curriculum and approval of the Superintendent and the Board based on curriculum changes, goals for selection, and the availability of suitable replacement materials.

Non-basic materials shall be removed from collections by individual certificated staff holding such collections with the advice and approval of the immediate supervisor.

Materials that have been appropriately withdrawn shall be disposed of by the Superintendent or designee per state legal requirements.

Approved:

June 26, 2003

Dale E. Kinsley
Superintendent of Schools

Acquire -- Support Materials Selection Sources

Best Tools	Abbreviation	Title of Journal or Web Site	Description and web site address
	ALA	American Library Association Best Books Lists and Notable Books lists	http://www.ala.org/alsc/awards.html
	Spandel	An Annotated Bibliography for Use with the 6 Trait Analytic Model of Writing	http://www.nwrel.org/ - This book lists picture books that help in teaching the writing process. Purchased from Northwest Regional Labs in Portland.
	BL	Book Links; Connecting Books, Libraries and Classrooms.	http://www.ala.org/BookLinks/index.html – a magazine designed for teachers, librarians, library media specialists, booksellers, parents and others interested in connecting children with high quality books.
★	BKL	Booklist	http://www.ala.org/booklist.html A review in Booklist constitutes a recommendation for purchase. Each issues covers five areas: forthcoming titles, adult books, books for youth, non-print and reference books. Outstanding titles are starred and adult books suitable for younger readers are labeled YA. Includes Dewey numbers, LC subject headings, and card numbers. Essential source for all libraries.
	BCCR	Bulletin of the Center for Children's Books	http://alexia.lis.uiuc.edu/puboff/bccb/ Highly regarded children's review source, this monthly periodical includes annotations, grade level, range of quality, books of quality and not-recommended titles.
	Braddon	Math Through Children's Literature: Making the NCTM Standards Come Alive, by Braddon, Hall and Taylor	http://www.amazon.com/exec/obidos/ISBN%3D0872879321/bythenumbersmathA/103-7226501-3497443 Offers information on books that help support the new math standards
★	BTSB	Bound to Stay Bound	http://www.btsb.com/ Top site for elementary ordering. Librarian login required to access book lists, on-line ordering. Review sources listed for titles.
	CITC	California Instructional Technology Clearinghouse	http://clearinghouse.k12.ca.us/ - videotape review source – materials that meet California's Instructional Learning Objectives.
	C-Span	C-Span Booknotes	http://www.booknotes.org/Program/?ProgramID=1126 First chapters of books featured on C-Span's Booknotes programs. Great books for high school readers and adults.
	CLWS	Children's Literature Web Guide	http://www.ucalgary.ca/~dkbrown/index.html This is one of the best sites on the web for children's and young adult literature. Lists award-winning books, Best Book Lists from the major library associations, and many other excellent books.
	EG	Evergreen Book Award	http://www.wlma.org/assoc/evergr.htm The Evergreen Young Adult Book Award is sponsored by WASHYARG, Washington Young Adult Review Group. Voters for this award must be in grades 7 - 12. Ballots for those reading 3 or more titles are to be turned in to librarians March 1-15.

☆	HB	Horn Book Magazine	http://www.hbook.com/ The Horn Book Magazine offers in-depth reviews of the newest books available for children and young adults, lively and provocative articles and columns concerning all aspects of books for young people, and up-to-date information about the field of children's books. Online Guide requires paid subscription and login, but other sections accessible.
	Kirkus	Kirkus Reviews	Adults, Children & Young Adult books. Pointers note books of "unusually high quality." Reviews are discerning and critical. Kirkus Reviews, 200 Park Avenue South, New York, NY 10010-1543
	Kliatt	Kliatt	http://hometown.aol.com/kliatt/ Insightful reviews of paperbacks, hardcover fiction, audio books and educational software help you select the best materials for secondary students and teachers. Recommends over 1500 items every year.
	L&L	Learning and Leading with Technology	http://www.iste.org/L&L/index.html – materials and ideas for integrating technology into the curriculum including software reviews.
	LMC	Library Media Connection	http://www.linworth.com/lmc.html Provides essential advice for school librarians with ideas, and independent critical reviews on fiction, non-fiction, professional reading, software, CD-ROMs, videos, and online resources.
	MMS	Multimedia Schools	http://www.infoday.com/MMSchools/ A practical, how-to magazine sharply focused on the needs of school practitioners. Articles, reviews, and columns address issues associated with using electronic information resources in k-12 schools. Software and book reviews available on the website.
	NYT	New York Times Book Review	http://www.nytimes.com/pages/books/review/ - Reviews good books, and those making the news, scholarly works, literary fiction, bad books by famous authors, good ones by first-time novelists, children's books, pop culture. High school level.
	Nobel	Nobel Prize for Literature Winners	http://www.nobel.se/ This site is useful for high school libraries that maintain a collection of the Nobel winners in literature for their contemporary literature classes.
☆	PubWk	Publisher's Weekly	http://www.publishersweekly.com/ Regular issues in specific subject areas (children's books, religion, etc.) are useful for subject area concentrations. Useful for high school level.
	Pulitzer	Pulitzer Prize for Literature Winners	http://www.pulitzer.org A good site for high school libraries that maintain a collection of the Pulitzer Prize winners in literature for their contemporary literature classes.
	SAS	Sasquatch Book Award (gr. 4-6)	http://www.wlma.org/assoc/sasquatch.htm - Children's choice awards from Washington State elementary/middle students
☆	SLJ	School Library Journal	http://www.schoollibraryjournal.com/ Concisely-written and evaluative reviews. Feature articles, checklist of inexpensive pamphlets, posters, and other useful information for school librarians. No reviews online, just in print version.
☆	SBF	Science Books and Films	http://www.sbsonline.com/ Indispensable tool for science book selection. Each issue contains children's books, young adult books, and general audience books. The annual best books and best AV lists also useful.

	TL	Teacher Librarian	http://www.teacherlibrarian.com/ Promotes excellence in library services for children and young adults, through articles exploring current issues such as collaboration, leadership, technology, advocacy, information literacy, and management.
	VL	Video Librarian	http://www.videoliberalian.com/ The electronic addendum to the print magazine <i>Video Librarian</i> , which is the "most comprehensive video review magazine in the world."
	YRC	Young Reader's Choice Award	http://pnla.org/yrca/ - Sponsored by the Pacific Northwest Library Association. Students in grades 4-8 and 9-12 vote annually.
	VOYA	VOYA (Voice of Youth Advocates)	http://www.voya.com/ A bimonthly journal addressing librarians, educators, and other professionals who work with young adults. The only magazine devoted exclusively to the informational needs of teenagers.
	WCCPBA	Washington Children's Choice Picture Book Awards (gr. K-3)	http://www.wlma.org/assoc/wccpb.htm This list of good books is selected and voted on by primary and elementary children in Washington state. Sponsored by the Washington Library Media Association.

Acquire -- Support Materials
Materials-Ordering Steps

1. Select materials from approved selection sources.
2. Create an online working book order file using formats offered by BTSB and Mackin. Email Library Media Technology Secretary when your order is complete and ready to send. Only the LMT Secretary can submit these orders for purchase. Password and Order Name are required.
3. Use of online order forms is preferred, however, you may create an order database file by copying the [ordertemplate.xls](#) file and renaming it.
 - Enter data into cells of the spreadsheet. Follow format below for entry in Review field (selection source you used in selecting the material)
 - Email the completed file to the Library Media & Technology secretary. Label the order with the school name and date.
4. Fill out required Forms B, C and Software if required. Use “See attached” to refer to multiple titles with identical evaluations. Sign and obtain principal’s signature. Keep a copy.
5. Print a copy of your order. (For online orders be sure to select the option that includes review sources). Attach IMC forms. Send by District mail to Library Media & Technology Secretary.
6. Keep a copy for your files.
7. Annual Library Budget Allotments are distributed several times each year. See example below.

Annual Library Budget Allotment example:

P.O Number	369457	369558	369560	369648	369723	369856
Vendor	EBSCO	BTSB	Mackin	World Almanac	BTSB	Mackin
Allotment	\$4,750.00	\$4,646.80	\$4,238.17	\$4,135.03	\$4,079.22	\$2,609.95
Amount	103.20	408.63	103.14	55.81	1,469.27	550.39
<i>Balance</i>	\$4,646.80	\$4,238.17	\$4,135.03	\$4,079.22	\$2,609.95	\$2,059.56

BELLINGHAM PUBLIC SCHOOLS

NON-BASIC INSTRUCTIONAL MATERIALS - AV EVALUATION FORM - B

Use this form for videos, videodisks and other AV materials.

TITLE: _____

AUTHOR/PUBLISHER: _____

COPYRIGHT DATE: _____ TYPE OF MEDIA (Videotape, Videodisk, CD-ROM etc.): _____
 IS THIS MATERIAL: _____ Building Library Media Center Collection
 _____ District Library Media Collection

GENERAL OVERVIEW Rate this AV production on the scale provided (from 5 to 1). Please be prepared to provide reasons to back up your evaluation. To join our collection or remain in our collection, an item must obtain ratings in the 4-5 range. Even if ratings are high in some categories, ratings of 1-2 will normally block the AV from use with students or staff. Write additional comments in between as appropriate.

5=exemplary 4=good 3=adequate 2=mediocre 1=unacceptable

___1. Curriculum Appropriate? This item is consistent with District-adopted curriculum and relevant policies, procedures, and regulations. It will support and enrich the curriculum, taking into consideration the varied instructional needs, learning styles, abilities and developmental levels of the students served. Teachers may employ this material to stimulate student growth in critical thinking, reasoning, and problem solving.

___2. Fair and Balanced? Properly used in combination with other AV material, this item will meet the diverse needs and characteristics of students while presenting balanced but differing views of issues, controversial or otherwise. It will contribute to the development of self-respect, pride and an appreciation of differences and reflect respect for the worth and dignity of all people. If not fair and balanced, the teacher/individual user will provide understanding of the bias the materials represent and opportunities for students to explore the other sides of the issue.

___3. Well Produced? This item shares information in a reasonably lively and vivid manner so as to engage student interest. Given the high quality of visual materials currently available to students outside of schools, instructional materials should generally meet contemporary production standards. In some cases, classics might be excluded from this criterion.

___4. Accurate and Current? The information communicated in this production is consistent with contemporary knowledge and research. The knowledge and concepts are well structured, comprehensive and coherently presented.

___5. Developmentally Appropriate? The organization and presentation of ideas and information meet the needs of the age group and the audience for which it was intended. Coverage of controversial material and issues matches normal expectations for the age level.

EVALUATOR: _____ SCHOOL: _____ DATE: _____

**FORM 1040 NB - B
BELLINGHAM PUBLIC SCHOOLS**

NON-BASIC INSTRUCTIONAL MATERIALS EVALUATION FORM - B
Use this form for materials that students can select voluntarily.

TITLE: _____

AUTHOR/PUBLISHER: _____

COPYRIGHT DATE: _____ **PRODUCER:** _____ **VENDOR:** _____

TYPE OF MEDIA (Book, Videotape, etc.): _____

IS THIS MATERIAL:
 Building Library Media Center Collection
 District Library Media Collection
 Classroom Library
 Other: _____

Please indicate your assessment of these materials by checking the appropriate box. If NA, briefly explain.

YES	NO	NA	Instructional Materials shall:
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	1. Be consistent with District-adopted curriculum and relevant policies, procedures, and regulations.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	2. Support and enrich the curriculum, taking into consideration the varied instructional needs, learning styles, abilities and developmental levels of the students served.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	3. Stimulate student growth in critical thinking, reasoning, and problem solving and support lifelong learning and workplace application.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	4. Be of sufficient variety to meet the diverse needs/characteristics of students and present balanced but differing views of issues, controversial or otherwise, in order that students may develop analytical and decision-making skills.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	5. Contribute to the development of self-respect, pride and an appreciation of differences and reflect respect for the worth and dignity of all people.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	6. Offer the most appropriate format(s) (including technological, visual and/or auditory components) to support adopted curriculum).
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	7. Be generally free of gender, race, and religious bias and stereotyping.
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	8. Readability/comprehensible/developmentally appropriate (grade and interest level).

I have reviewed the material and it meets the above criteria.

REQUESTER: _____ **SCHOOL:** _____ **DATE:** _____

DEPARTMENT CHAIR OR OTHER TEACHER: _____ **DATE:** _____

PRINCIPAL: _____ **DATE:** _____

BELLINGHAM PUBLIC SCHOOLS

NON-BASIC INSTRUCTIONAL MATERIALS EVALUATION FORM - C

Use this form for materials that students may select voluntarily which are being ordered by virtue of their inclusion in a list of items approved and recommended by a national group (such as the American Library Association) applying values and criteria compatible with the Bellingham materials selection criteria.

Title	Author	Copyright Date	Type of Media	Location

Location Codes:

- Bldg. - Building Library Media Center Collection
- Dist. - District Library Media Collection
- Class - Classroom Library
- Other

Reviews of the above listed instructional materials indicate that they

1. Are consistent with District-adopted curriculum and relevant policies, procedures, and regulations.
2. Support and enrich the curriculum, taking into consideration the varied instructional needs, learning styles, abilities and developmental levels of the students served.
3. Stimulate student growth in critical thinking, reasoning, and problem solving and support lifelong learning and workplace application.
4. Are of sufficient variety to meet the diverse needs/characteristics of students and present balanced but differing views of issues, controversial or otherwise, in order that students may develop analytical and decision-making skills.
5. Contribute to the development of self-respect, pride and an appreciation of differences and reflect respect for the worth and dignity of all people.
6. Offer the most appropriate format(s) (including technological, visual and/or auditory components) to support adopted curriculum).
7. Are generally free of gender, race, and religious bias and stereotyping.
8. Provide readability/comprehensible/developmentally appropriate (grade and interest level).

REQUESTER: _____ SCHOOL: _____ DATE: _____

DEPARTMENT CHAIR OR OTHER TEACHER: _____ DATE: _____

PRINCIPAL: _____ DATE: _____

BELLINGHAM PUBLIC SCHOOLS

INSTRUCTIONAL SOFTWARE EVALUATION FORM Page 1

PROGRAM TITLE: _____ COPYRIGHT DATE: _____
SOURCE: _____ COST: _____
CONTENT AREA: _____
PROGRAM OBJECTIVE: _____

DESCRIBE PLAN FOR USE OF SOFTWARE: (One copy on teacher/classroom computer or use in
computer labs or classroom labs? Supplemental or basic part of curriculum? For use with what courses?)

GRADE LEVEL: _____ Primary (K-2) _____ Middle (6-8)
_____ Intermediate (3-5) _____ High (9-12)

TYPE OF PROGRAM

- Simulation Tutorial Word Processing
Problem solving Testing Graphics
Educational game Reference Data base
Drill & practice Informational Spreadsheet
Demonstration Classroom management Other

YES NO TECHNICAL QUALITY: _____ EXCELLENT _____ GOOD _____ WEAK _____ NA
Free of program errors
Creative
Interactive

EASE OF USE: _____ EXCELLENT _____ GOOD _____ WEAK _____ NA
Clear instructions
Pacing can be controlled
Readable format
Sound control

CONTENT: _____ EXCELLENT _____ GOOD _____ WEAK _____ NA
Accurate and relevant
Free of sexual stereotypes and biases
Free of other forms of bias and stereotypes (use Screening Guidelines for Bias and Stereotypes)
Motivational
Self evaluating

SUPPORT MATERIALS: _____

ADDITIONAL EQUIPMENT NECESSARY (e.g. printer, CD-ROM Drive, DVD Player): _____
COMMENTS:

EVALUATOR: _____ SCHOOL: _____ DATE: _____
Complete and attach page 2 of this form

INSTRUCTIONAL SOFTWARE EVALUATION FORM, Page 2

Questions for Software Purchasing

<p>Does this software actively engage students in one or more of the district's primary technology goals: communicating, analyzing data, and/or problem-solving</p>	<p>To what extent does this software promote and require original thought and creating as opposed to "paint-by-numbers" and cookie cutter approaches to production?</p>
<p>How does this software compare with competing software? Why buy and install this rather than the competitor? Which are the most important features?</p>	<p>Is the software a good use of students' limited technology time? Could students be engaged in something more profitable during this time?</p>
<p>Other comments about need for software, planned use, special circumstances</p>	

Tech Committee Names	Review Date

<p>Is this software compatible with our network and software?</p>	
Network Services	Date

<p>Recommendation of Tech Committee. Comments:</p>	<p>Purchase? <input type="checkbox"/> YES <input type="checkbox"/> NO</p>
Principal	Date
Tech Committee Chair	Date

Acquire -- Support Materials
Checklist for Processing New Materials

1. Check in new materials and compare to original order.

- Check materials against order form
- Note titles not received for possible future orders

2. Process materials into the collection

- Check call number for collection match
- Ownership stamp
- Assign categories (optional)
 - Year of purchase
 - New materials (monthly)
 - Other – assigned by cataloger

3. Edit MARC record to maximize patron access.

- Add or delete subjects as needed
- Add contents notes at 505 as needed
- Add summary at 520 as needed
- Add Accelerated Reader level at 440

Acquire -- Support Materials
Adding MARC Records

1. Open Cataloging
2. Select Title button
3. Type in the title of the work you want to add to the collection.
4. If the title is not in your collection, click on the Database button, which will connect you to the Alliance Plus cd-rom disk on the network server.
 - If the record is on Alliance, edit the fields for your collection
 - Add the local call number
 - Add the 510 field with the Selection Source
 - Add contents to the 505 field
 - Add summary if needed to the 520 field
 - Check additional subject headings in 600, 650, 651
 - Save the record to the local database
 - Answer Yes to “Do you want to add copy information?” Add copy information.
5. If the title is already in your collection, press Add.
 - Answer Yes to “Do you want to duplicate this record?”
 - Add copy information. Save
6. If the title is neither in your local database, nor on the Alliance Plus cd-rom, you have two options:
 - Check the database at the Library of Congress (<http://catalog.loc.gov/>). Select “Basic Search”, enter Title, select “MARC Tags” tab, print page from browser, and then copy the data exactly into your database.
 - Create your own original MARC record using the *MARC Record Guide* (<http://lcweb.loc.gov/marc/umb/>). This is a rather complex process that requires intense focus and attention to detail. Use this option as a last alternative. A guide called *MARC Bibliographic Format Guide*. (http://www.fsc.follett.com/products/marc_format/index.cfm) is available for purchase (about \$60). It has detailed information for each MARC tag, with examples, which may be useful for secondary librarians.

Acquire – Support Materials
Requests for Reconsideration of Instructional Materials

1. If a parent or guardian objects to the inclusion of material in the library collection, listen carefully to their concerns. Explain why you selected the material. Show review source(s) for the material (these should be on your materials order database).
2. If this informal process does not resolve the matter, the parent, guardian or custodian may submit a formal *Request for Reconsideration of Instructional Materials*, which follows the process required in the District's *Instructional Materials Procedures*.
3. Alert your building principal and the Director of Library Media and Technology, Nancy Messmer whenever a parent has questioned materials or requests the Reconsideration of Materials form.

BELLINGHAM PUBLIC SCHOOLS

2311F

REQUEST FOR RECONSIDERATION OF INSTRUCTIONAL MATERIALS

DATE: _____

TITLE: _____

AUTHOR/PRODUCER (if known): _____

TYPE OF MATERIAL (e.g., assigned text, supplemental reading material, library material, etc.): _____

NAME OF REQUESTER: _____ TELEPHONE: _____

ADDRESS: _____

SCHOOL STUDENT ATTENDS: _____ GRADE LEVEL: _____

REQUESTER REPRESENTS: Parent Guardian/Custodian Other (please specify) _____

1. What specific passages or aspects of the material do you object to? Please include page numbers, quotes, and/or excerpts, if possible. _____

2. What do you feel might be the result of reading/viewing this material? _____

3. For what age group would you recommend this material? _____

4. Is there anything of value in this material? _____

5. Did you read/view the entire content? What parts? _____

6. What do you believe is the theme of this material? _____

7. What would you like your school to do about this material? (e.g., do not assign it to my child; withdraw it from all students as well as from my child; send it back to the Instructional Material Committee (IMC) for additional evaluation)

8. In its place, what material would you recommend on the subject? _____

Signature of Requester _____

Please return this form to the Superintendent's Office at 1306 Dupont Street

June 26, 2003

Maximize Access -- Know How to Bring Resources and People Together

Support Materials:

Editing and Enhancing MARC records
Authority Records
Categories

A. Maximize search capabilities for users.

1. Provide, *Edit and Enhance MARC records*, as time permits.
2. Create *Authority Records* to cross-reference resources.

B. Publicize diversity of resources.

1. Direct users to networked and single-user resources: cd-roms, Internet websites, resources on public drives, online reference
2. Publicize new materials
3. Publish genre, theme and *Category Lists* as requested.

C. Provide accessibility for all users.

Maximize Access -- Support Materials **Editing & Enhancing MARC Records**

The reason to edit or enhance a MARC record is to increase student and staff access to materials in collection, through better keyword searches.

Prime targets for enhancing MARC records are short story collections, biography collections, folklore and legends, or chapters of general books in the science area. Brief MARC records in the catalog would also be useful as complete records. Adding a book award (Sasquatch, Washington Children's Choice) as a subject heading might also be useful for students and teachers, or Accelerated Reader color-coding.

1. Open Follett Programs/Cataloging
2. Open the MARC record for the book to be edited, with a title or author search.
3. Editing/enhancing suggestions:
 - a. For new books, after record has been added to system:
 - Add review source(s) at 510 tag
 - Check local call number at 900 tag
 - Decide if it matches the collection, or if re-classifying is needed
 - Check subject headings in 650 and 651 tags
 - Add, delete or revise to match collection
 - Add copy information
 - Check accuracy of price, circulation period, etc (see categories, below)
 - Save
 - b. Further suggestions for enhancement of records, as books arrive or later
 - Add Contents Notes (505 tag), naming chapter titles, or topics, for such books as Story Collections, Collected biographies, Plays, Mythology, Books covering numerous animals.

Format example: 505 2~~0~~ _a Peter Rabbit -- Three pigs – Cinderella

- Check subject headings for usefulness to local collection. Add (from *Sears List of Subject Headings*) or revise
- Check to make sure there is a Summary (520 tag)
- Add an Electronic Location and Access tag (856) to link to a specific Internet site that would supplement a particular title
- For award-winning books, add an Awards Note (586 tag)
- For Accelerated Reader books, add level color on Series tag (420)

Maximize Access -- Support materials
Authority Records:
Editing and Creating "see" and "see also" Cross-references

Since our patrons often think of search terms that are not "authorized" by the Officials of Library subject headings, it is important to create signposts within the database to help them find what they need. These signposts are called Authority Records (cross-references), and they are added to your local database as follows:

Edit Existing Authority Records

1. Start Follett applications; open Cataloging.
2. To view or edit current Authority Records, go to the Search menu and select Authority Headings. You will see a list of all the subject headings for which you have already created cross-references. These should be subject headings found in Sears List of Subject Headings or other cataloging authority reference.
3. Highlight and click Select button to edit an Authority Record. You will see the standardized subject headings and any "See" or "See Also" cross-references that have been created.
4. Click the Edit button to access the Authority Record. The tags you will be changing are:
 - 150-- standardized subject heading
 - 450--"see" cross-reference directs patrons to a standardized subject heading using common words. *This is the most commonly used cross-reference.*
 - 550--"see also" cross-reference directs patrons to additional related standardized subject headings
5. When adding a 450 "see" cross-reference, think of the possible common search terms a patron would use in searching for materials on this subject.
6. Click on the Insert Tag button, type 450 and click Insert. Type in one common search term beside the new 450 tag. Insert additional 450 tags for all possible search terms you wish to add. Save the Authority Record.
7. When adding a 550 "see also" cross-reference, consult Sears List of Subject Headings for other standardized headings that could be used for this record.
8. Click on the Insert Tag button, type 550 and click Insert. Type in the standardized Sears heading. You may need to insert subfield tags for complex subject headings.

Creating New Authority Records

Note: Sears List of Subject Headings suggests hundreds of cross-references that would be useful to the patron. You should mark in your copy of Sears any references you create.

1. Open Follett Cataloging. Click on File, New Authority. From list of Authority Record Types, select Authority-Subject: Topical (650 tag). Authority-Subject: Geographical (651 tag) may also be used.
2. The subjects you are referencing need to appear in the 650 or 651 tag of the MARC records.
3. In the 150 tag, type in the standardized subject you want the patron to be sent TO. Example: Space vehicles. (This is the actual heading your library will use, indicated by boldface type in the Sears List of Subject Headings).
4. When creating a 450 tag, type in a term that the patron might use. The 450 tag redirects patrons FROM a term, TO your 150 tag, or the standardized subject. Example: Space ships SEE Space vehicles.
5. Add additional 450 tags as needed. Click on the Insert Tag button, type 450 and click Insert. Type one common search term beside each new 450 tag. Insert additional 450 tags for all search terms you wish to add. Save the Authority Record.

Note: The term you type in a 450 tag must not exist anywhere in the system as a 650-tag subject.

6. When creating a 550 tag, type in a subject heading that is related to the existing subject heading already entered in the 150 field. For example: Space shuttles SEE ALSO: Space vehicles. You may enter as many 550 tags as needed.

Note: Both subjects you enter must exist in the MARC records as the type of subjects (topical or geographical) you chose in Step 1.

7. Save the Authority Record.

What librarian enters in MARC	What patron sees in OPAC
150 Space vehicles	Space ships SEE Space vehicles Spacecraft SEE Space vehicles
450 Space ships	
450 Spacecraft	
550 Space shuttles	Space shuttles SEE ALSO Space vehicles

Maximize Access – Support Materials

Categories

Categories are useful for creating bibliographies of materials that are not listed together under one Sears subject heading. For example: “New Books, January ‘04” or “Colonial America Unit”. Only one copy of a title should be given a particular category number, to avoid duplicates on printed bibliographies.

1. To create a Category:

Go to System setup / Setup / Cataloging
Categories tab / New
Choose a code number or accept next available
Give category a name or description
Save

2. To add to record

Open the MARC record for the title to be “categorized” in Cataloging
Open one Copy record of the title
Click Categories button
Highlight category name and click on “Add” / Save

3. To create a category list

Open Follett Reports / Cataloging reports
Bibliography report
Select by...(choose "Category")
Starting at...(choose the name of the category group to print)
Ending at...(usually the same as above)
Sort by...(usually by Call number)
Check "Show annotations".
The "Print" choice gives the standard printout. If you "Print to file", you can convert it to a WORD document and edit the appearance as needed.

Maintain -- Know How to Keep the Collection Current and Functional

Support materials:

Rebinds
Weeding schedule
Discarding Library Materials
Removing Items from the Follett Library Database
District Guidelines for Collecting and Submitting Money for Lost or Damaged Materials
Miscellaneous Collection Housekeeping Tasks
Annual Report of Collection Maintenance

A. Care for library resources.

1. Repair, *Rebind* and practice preventive maintenance on materials and equipment.
2. Order adequate supplies for maintenance and repair.
3. Teach proper use of materials
4. Use a variety of strategies to keep the collection viable, including regular overdue notices, bills, phone calls, and administrative action.

B. Eliminate materials that do not conform to district guidelines using the 5-year *Weeding Schedule*

1. Practice informal weeding throughout the year.
2. Process discards according to *Discarding Library Materials, Discarding Materials to Classrooms, Discarding Textbooks that are in the Follett Database* and those that are *Not in the Follett Database*. Find procedures for *Removing Items from the Follett Library Database*. Use *Discard Form* for use by the LMS to track boxes of discards for each year.

C. Follow acceptable alternatives for dealing with lost and damaged materials.

D. Perform occasional housekeeping chores *Miscellaneous Collection Housekeeping Tasks*.

E. Produce records of collection maintenance and development.

1. Submit *Annual Report of Collection Maintenance* checklist to Library Media & Technology at the end of the school year.
2. Submit list of discarded books and other documents as requested by Director of Library Media & Technology.
3. Keep file copies of above reports on site.

Maintain -- Support Materials

Rebinds

In the rebinding process, the covers and end papers are removed, the edges of the pages are “shaved” and washed, and new covers and end papers are applied. Rebind costs are taken from your book budget.

Consider rebinding a book if it meets Criteria #1 and several additional criteria:

1. It meets BPS Instructional Materials standards
2. The binding is falling apart
3. The pages are in excellent shape
4. It circulates well
5. It is difficult, impossible, or very costly to replace
6. It is an essential part of the library collection
7. It is more cost-effective to have it rebound than to purchase a new copy

A standard (not oversized) book will usually cost between \$8 and \$9. Generic “wallpaper-print” covers are supplied, unless the book is quite recent. Consider this in your decision to rebind.

Processing rebinds:

1. Create a patron named Bindery (YEAR)
2. Check the book out to the Bindery patron.
3. Write the barcode on the title page of the book, about 1/2” from the gutter. Be sure your school stamp is on the title page.
4. Save the book jacket for use on the book when it returns from the bindery, or scan, cover and create a new book jacket.
5. Hold at your school until May 15. Library Media & Technology sends books to the bindery only in June.
6. Print 2 copies of the transaction list for the Bindery patron. The list should include title, barcode, and call number of each book to be rebound. Put one copy of the list with the rebinds, save one for your files.
7. There is no minimum number of books you can send, but Library Media & Technology must have at least 50 before an order can go to the bindery.
8. Send the books and list to Library Media & Technology in the school delivery. E-mail LMT (Hubbard) to alert them the books are coming.
9. When they are returned from the Bindery, Library Media & Technology will put call numbers on the spine and a new barcode on the book. There is no charge for this service. Let Library Media & Technology know if you want barcodes and spine labels sent separately (for example, if you are putting on a new dust jacket).

10. When the books are returned to your library.

- a. Check the books against the list you printed earlier, to account for all books
- b. Check the books in, using the old barcode number, not the new one on the front of the book.
- c. If you wrote the old barcode number on the title page, put a line through it and write the new number beside it. There are occasions where it's helpful to know what the old barcode number was.
- d. Stamp your school stamp on the usual places.
- e. Update the MARC record copy to reflect the new number.
- f. Edit or enhance the MARC record before it goes back on the shelf.

Maintain -- Support Materials
Multi-Year Weeding Schedule

Elementary Schools

Area to Weed	Years	Years
500-999	2001-2002	2006-2007
000-499, Fiction A-L	2002-2003	2007-2008
Fiction M-Z, Biography, BC	2003-2004	2008-2009
ER	2004-2005	2009-2010
Everything else (weeder's choice)	2005-2006	2010-2011

Middle Schools

Area to Weed	Years	Years
000-499 (including Reference area)	2001-2002	2006-2007
500-799 (including reference area)	2002-2003	2007-2008
800-999 (including reference area)	2003-2004	2008-2009
B,SC, PB	2004-2005	2009-2010
F	2005-2006	2010-2011

High Schools

Area to Weed	Years	Years
000-499 (including Reference area)	2001-2002	2006-2007
500-799 (including reference area)	2002-2003	2007-2008
800, PB (including reference area)	2003-2004	2008-2009
900 (including reference area)	2004-2005	2009-2010
F, SC, SF, Biography, AV	2005-2006	2010-2011

Follow the 5-year *Weeding Schedule* for systematically weeding the collection, using various recommended criteria.

- Dated
- Patrons no longer need this book
- District guidelines are not met
- “MUSTY”: **M**isleading – **U**gly – **S**uperceded – **T**rivial – **Y**our collection has no use for this material.

Use the *Crewe Weeding booklet* in the supplementary materials at the end of this document.

Maintain -- Support materials

Discarding Instructional Materials

Items that are discarded because they are worn out, outdated, biased, etc., (i.e. they do not meet the standards described in the Bellingham School District Instructional Materials Policy) must be disposed of according to the following procedures. Each type of material has a slightly different discard procedure. The discard cycle runs from April 1st through March 30th.

Discarding Library Materials (Approved by LMT Director)

1. The Department of Library, Media, Technology has created a series of patrons called "Discard, Box #, Discard, Box ##, etc, in each Follett database." Throughout the year, check out discarded items to a discard box#. Notify LMT when you need additional box patrons created.
2. Order the number of discard boxes and box labels you will need from the Purchasing Department (email to Carol Rier). Additional boxes can be ordered at any time.
3. Check items out to the Discard Box # patrons. Use Box patrons in sequential order throughout the year. (Box patron numbers will be cleared and reused each year, starting again at Discard, Box1.)
4. Select Patron Information from the Circulation screen and print 2 copies of Patron Information for each box of discards. One copy to be filed in the building and the second to be attached to the End of Year Report.
5. Remove the barcode labels from the front of the book or make permanent mark over the barcode labels. Stamp "DISCARD" on the inside cover and title page. Cross out school name wherever it appears.
6. Box the discards and place provided labels on both ends of each box.
7. When boxes are full, send an email to Ken Russell (cc to Carol Rier) with the Box #s to be discarded. Indicate in the e-mail that these are library books.

Ken "sweeps" your database for these patron numbers and creates a spreadsheet of the titles for Nancy Messmer's approval. Nancy notifies Purchasing and the building librarian when the discards are approved. Purchasing completes the paperwork for transfer and pickup.

8. Place boxes of discards in your school's pick up location. Maintenance will pick up the boxes when their schedule permits.

9. Carol Rier will notify the LMS when all discard procedures are complete. The LMS will then remove the discarded items from their library database.
10. Use the Patron Information report to identify barcodes of copies/items to be deleted. If the barcode represents the last copy of a title, delete the copy and the entire MARC record.

Discarding Materials from the Library to the Classroom

Some items may be discarded from the library collection because they are worn, seldom used, or duplicate copies. If these items still meet the criteria in the District Instructional Materials Policy, they may be placed in a classroom for further use by teachers and students. These items remain the property of the Bellingham School District.

Create a record of these materials by following these steps:

1. Create a patron called “Discard to Classroom 03-04” indicating school year.
2. Checkout items to this patron throughout the year.
3. Select Patron Information from the Circulation screen and print 2 copies of Patron Information. One copy should be filed in the building and the second is to be attached to the End of Year Report.
4. Remove the barcode labels from the front of the books or make a permanent mark over the barcode label. Stamp “DISCARD” on the inside cover and title page.
5. Delete items from the database.
6. Books previously discarded to classrooms that are later returned to the librarian must be boxed and discarded using the *surplus book form.xls* and following the procedures for **Discarding Textbooks and Instructional Materials Not in Follett Database**. Email file to **Ken Russell (cc to Carol Rier)**

**Discarding Textbooks and Instructional Materials From a Follett
Database
(Approved by Curriculum Director)**

Note: Library materials and textbooks / curriculum materials have different discard procedures. Do not mix these materials in the same box. The Librarian makes the determination about whether the item is a curriculum material or part of the general library collection.

1. For textbooks and curriculum materials that are in the Follett database, check out to a Discard, Box # patron that includes only textbooks/instructional materials.
2. Select Patron Information from the Circulation screen and print a copy of Patron Information for each box of discards. Use the print out when deleting items from the Follett database. It does not need to be included in the box.
3. Box the discards and place provided labels on both ends of each box.
4. When boxes are full, send an email to **Ken Russell (cc to Carol Rier)** with the Box #s to be discarded. Indicate in the e-mail that these are textbooks and also the database in which they are located—Library or Textbook.

Ken “sweeps” your database for these patron numbers and creates a spreadsheet of the titles for approval. Ken notifies Purchasing and the building librarian when the discards are approved. Purchasing completes the paperwork for transfer and pickup.

5. Place boxes of discards in your school’s pick up location. Maintenance will pick up the boxes when their schedule permits.
6. When the boxes have been picked up from the school, the LMS will remove the discarded items from their library database.

Discarding Textbooks and Instructional Materials Not in Follett Database

1. Open *surplus book form.xls*, enabling macros, and fill in all fields for each title.
2. Save an electronic copy of the *surplus book form.xls* using the following filename format: **school code-box #** (ex: 01-001 = Alderwood-Box#1).
3. Assign box numbers consecutively from the Discard, Box # list in the Patron database. Do not duplicate a box number.
4. Attach the saved *surplus book form.xls* file to an **email** to **Carol Rier** notifying her that these materials are ready for surplus.
5. Print a hardcopy for your building records.
6. Place boxes of discards in your school's pick up location. Maintenance will pick up the boxes when their schedule permits.

Maintain -- Support Materials

Removing Items from the Follett Library Database

When you discard items, it is important to remove them from the database as soon as they leave the building. Be sure to keep a list of discarded items on file with the Library Year End Report.

A. If there is only one copy and you want to delete it:

1. Check to be sure that the barcode number is correct.
2. Open the MARC record. Check to see if there is actually only one copy (click copies).
3. Go to File and select the Delete Record line. This will delete both the record and the copy associated with it.
4. Are you sure? YES.

B. If there are multiple copies and you only want to delete one copy:

1. Open MARC Record
2. Click on Copies
3. Highlight barcode to be deleted. Press the delete button on the copy screen.
4. This process can also be done with the PhD+. Check directions in the Follett manual.

Maintain -- Support Materials

**District Guidelines for Collecting and Submitting Money
for Lost or Damaged Materials**

Funds collected for lost or damaged materials are deposited in the School's revenue account. The LMS may expend these funds, with administrative approval, to replace library materials.

1. Bills for lost books can be sent –
 - Anytime after the book is 4 weeks overdue
 - On the day after the final due date in June
 - At request of the student or parent when book is reported lost
2. Print Fine Notice from Follett Reports. You may alter the Follett bill statement's wording for your school. Go to: Follett -System Setup / Circulation / Notices / Bill for Overdue and edit the text of the notice in the gray box.
3. Follow the District Reimbursement Policy for lost or damaged materials, included in the Instructional Materials Policy.
4. Cash or checks made out to the school can be accepted.
5. A student remains responsible for any lost or damaged materials when:
 - Transferring to another district
 - Transferring to another school in our district
 - Graduating to another level, e.g., middle school to high schoolThe LMS or designee will inform the new LMS by email, noting materials the student needs to return or pay for. The new LMS will help students remember their obligation to their former school.
6. Elementary & Middle School: Money is paid to the school secretary, receipted and sent to Accounting. School Secretary retains copy of the district receipts. The Librarian keeps a log or spreadsheet in the library, which includes the date, student name, title, barcode number of book, amount paid, and district receipt number. (Example below)

Date	Student Name	Title	Barcode #	Amount	Receipt #

7. High School: Money is received & receipted in the library using a district receipt book. It is deposited monthly to Accounting. Accounting returns a district receipt for the monthly deposit, which is attached to the library's copy of the receipt log.

8. Book is checked out to Patron "Paid (current year)". Some Libraries add the receipt number to the Copy Record in the title line in case the book is found and returned.
9. Paid titles remain in the system until the LMS chooses to delete them. Keep a record of deleted items for two years.
10. If a Paid title is found, and the student is still enrolled, the secretary (or LMS at High School) submits a district refund form. The form is forwarded to Accounting.
11. Individual schools have the option to accept, in lieu of monetary payment, school service time, a replacement copy of the lost book, or a comparable replacement. A record of the alternate payment should be kept, but does not need to be receipted.
12. Libraries may also charge fines for damage to library materials and overdues. The LMS should keep a record on a miscellaneous fines sheet. The maximum fine for an overdue item is \$3.00.

Month/Year _____ Miscellaneous Fines Collected Log # _____

Date	Student Name	Amount collected	Received by:

13. The Accounting Department enters the money submitted by the school into a revenue account for that school. At the discretion of the school principal, that money can be used to replace lost materials in the library.

Note: You cannot spend money out of a revenue account. It is actually a "credit" toward your library's general fund budget. When submitting orders based on your revenue account, specify the general account fund number on your order, with a note that you are using the revenue account credit.

Maintain -- Support Materials
Miscellaneous Collection Housekeeping Tasks

Print a list of titles without copies. Determine if they need deleting. (Don't delete items from other libraries that show up in your database).

1. Reports Menu
2. Cataloging Reports
3. Starting at title AA to ZZ
4. Select "print to file" button and save to a convenient location. The default is to your server's Follett temp directory, ex: servername\cc30\temp.
5. *Note: Run it to a text file to save paper, since you don't know how long the original job will be.*
6. Open the text file in Word.
7. Print 10 pages at a time to work with. Determine if you need to delete titles without copies. Do not delete if they are located at the professional library or another school.

Print list of brief MARC records and determine need for enhancement.

1. Reports Menu
2. Cataloging Reports
3. Starting at title AA to (your choice)
4. Select "print to file" button and save to a convenient location. The default is to your server's Follett temp directory, ex: \\r2d2\cc30\temp
5. Open the text file in Word.
6. Determine which records to update to full record.

Other report options for collection maintenance:

- Circulation Reports: Collection Age by call number
- Circulation Reports: Collection Age by category
- Circulation Reports: Inventory list by call number or title (books missing in specified years, or range of years).

Annual Report of Collection Maintenance

Submit to Library Media & Technology in June

Checklist for School _____ LMS: _____ Date: _____

ASSESS:

- Used various recommended strategies to evaluate the collection during the year (Assess, letter A1)
- Involved students and staff in improving the collection (letter A2)
- Performed an annual inventory
- Maintained inventory records and reports on site (lost and missing materials, discards, lost and paid items, report of collection by Dewey number)

ACQUIRE:

- Submitted library material orders attaching evaluation forms B and/or C.
- Sent evaluation forms B and C for gift or donated materials.
- Recorded selection sources in the MARC record (510)

MAXIMIZE ACCESS:

- Enhanced MARC records for greater accessibility
- Ensured that desktop users in my building have access to information resources on the network.

MAINTAIN:

- Sent books for rebinding and supervised repairs on site.
- Followed district or site procedures for damaged or lost materials.
- Discarded library materials according to established criteria and district procedures.
- Submitted supply orders from Library Media & Technology budget or building budget.

ATTACHMENTS:

- Dewey collection report by 100's
- Discarded materials printouts
- Goals accomplished (optional)
- Goals for next year (optional)
- Other – LMS choice: