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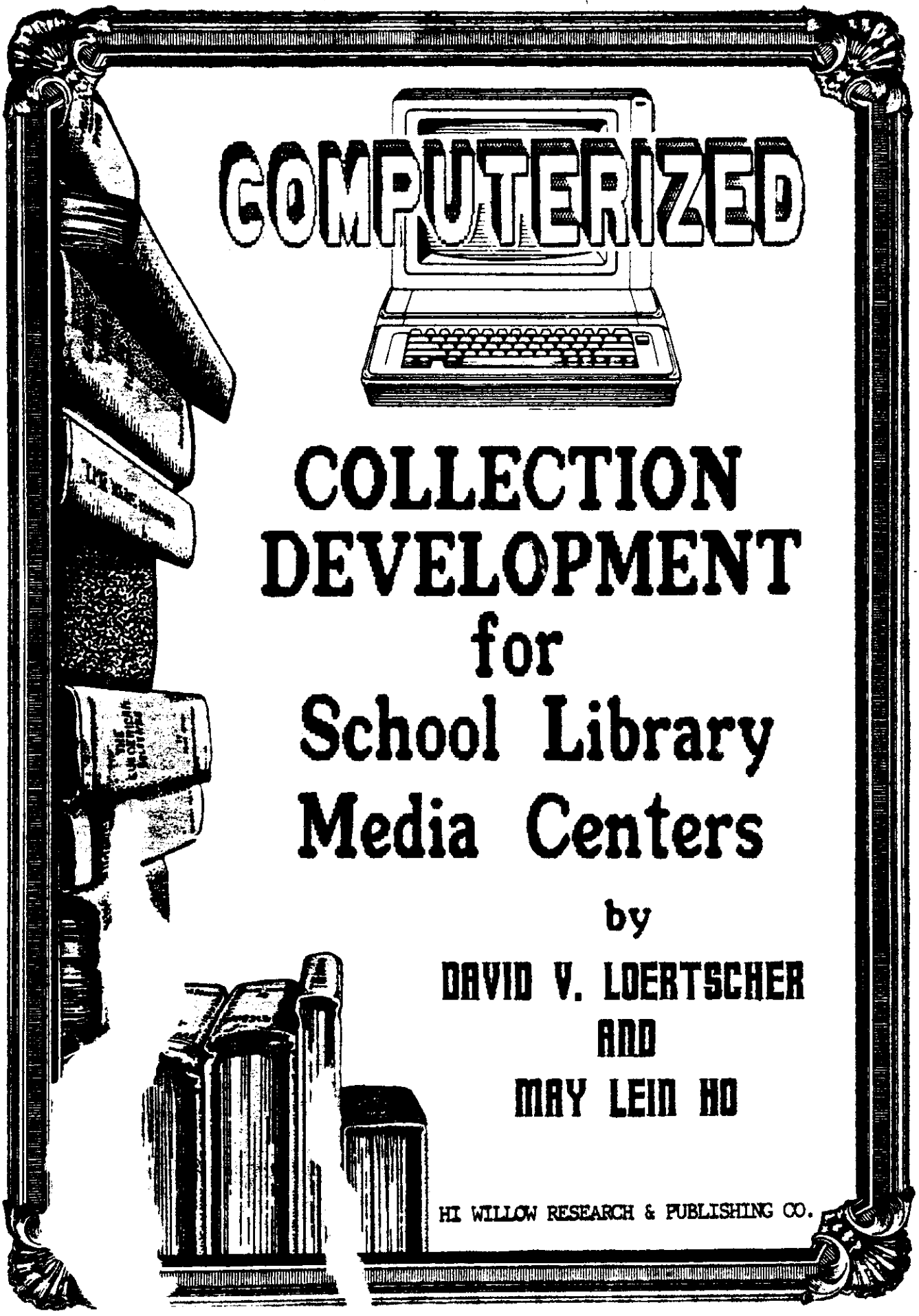

COMPUTERIZED COLLECTION DEVELOPMENT for School Library Media Centers

by

DAVID V. LOERTSCHER
AND
MAY LEIN HO

HI WILLOW RESEARCH & PUBLISHING CO.

David V. Loertscher

Computerized Collection Development For School Library Media Centers

by
David V. Loertscher
May Lein Ho

Excellence in School Library Media Programs, No. 2

First Edition

Hi Willow Research and Publishing
1986

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Hi Willow Research and Publishing
P.O. Box 1801
Fayetteville, Arkansas 72702-1801

Credits:

Cover Design: Marian Colclasure
Internal Graphics Design: Mark Loertscher

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Other titles in the Series:

#1: A Taxonomy for the School Library Media Program by David V. Loertscher.

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DEDICATION

To the many library media specialists who piloted this system, for their professionalism and kind suggestions.

And to a few great library media specialists whose work has been an inspiration.

Frances Henne

Mary Gaver

Carolyn Whitenack

Peggy Pfeiffer

Eleanor Ahlers

Appreciation

Special thanks is extended to Marian Coleclasure who edited the manuscript. Blanche Woolls assisted in the preparation of the Technology Evaluation Form.

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Introduction

INTRODUCTION

For many years, collection building practices in school library media centers have been influenced heavily by collection building methods for public libraries. The current manual challenges that method and proposes a system to connect the school library media collection directly to curricular needs.

There are two purposes for this manual. The first is to provide step-by-step instructions in creating an entire collection development system on an Apple computer using the program AppleWorks. The second purpose is to provide a handbook for a workshop leader who is desirous of introducing the system to a group of library media specialists.

The system proposed here has been developed over a five year period with more than 100 library media specialists participating in its development both in classes taught by the authors and in a major research project involving 80 schools from various parts of the country.

While the entire system could be used without the aid of a computer, the automated sections of the system will save countless precious hours which can be used more productively.

Because of its popularity, AppleWorks has been selected as the basis of the entire collection development system. Library media specialists should have a working knowledge of that program before attempting to implement this system fully. If the rudiments of AppleWorks need to be mastered, the authors recommend the following book:

Ho, May Lein. AppleWorks for School Librarians. Hi Willow Research and Publishing, P.O. Box 1801, Fayetteville, AR 72702-1801. $21.50 (post paid)

Library media specialists who know word processors, database managers and spreadsheet programs other than AppleWorks should still find this manual useful. Most of the templates can be set up quite easily in such programs as PFS File and Multiplan. Integrated programs for the MacIntosh or IBM PC such as Jazz, Lotus 1,2,3 or Framework II can be used by adapting the templates included here.

Library media specialists who have adopted fully automated technical service packages may recognize from this manual many operations which can be done as a part of their current system and may discover that AppleWorks might be used for some functions in support of the fully automated package.

The entire collection development system is explained in six chapters and six appendices. Each chapter has a matching appendix which contains overhead transparency masters, forms and other useful aides in teaching and studying the partner chapter.

The manual comes with two template disks. The templates on the disks follow the development of the system. Side One contains templates for Phase One, Side Two, Phase Two, etc.

These template disks are not to be used in their original form. Copies of them should be made. If the original templates are used for practice, various formulas may be altered, thus destroying the step-by-step instructions for the next user.

The basic plan of instruction is to:

1. Introduce a concept.

2. Have the student practice the concept on a Sample School.

3. Use the system for an actual school.

Every template on the disks has a companion sample file for the Sample School. The library media specialist can always refer to the Sample School files to see if the concepts are being understood properly.

For those who wish to dive into the system with little or no instruction, read Chapter Two as an overview of the system and then study the following templates:

Collect.chart - Side One
Budget - Side Two
Emphasis.budget - Side Two
Consid.acq.file - Side Three
Qual.eval.ssl - Side Four

Another valuable place to begin is with the computerized consideration file which is discussed in Chapter Five. Understanding the collection map and the computer acquisition file which matches it are two basic parts of the system which provide a basis for the rest.

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To correspond with May Lein Ho, write Peabody Learning Resources Center, Peabody Hall 201, University of Arkansas, Fayetteville, AR 72701. 501-575-5444 (work)

Comments and corrections are welcome.

For a more detailed description of collection mapping and other evaluative measures for school library media programs, David V. Loertscher has edited an issue of Drexel Library Quarterly, Volume 21, #2: "Measures of Excellence for School Library Media Centers" (1985)

which can be ordered for $10 from: Drexel Library Quarterly, College of information Studies, Drexel University, Philadelphia, PA 19104. Copies of two articles from this issue including the philosophy of collection mapping by David V. Loertscher and the reporting of the research done in 80 schools by May Lein Ho are on the Side Four of the template disks included with this manual (with kind permission of the Quarterly). Their file names are Ho.1, Ho.2 and Loertscher.

Notes for Workshop Leaders:

The system need not be introduced in sequence. Success of a workshop is as much dependent on the participant's knowledge of AppleWorks as it is on the mechanics presented in this manual. Several workshops might be offered on various phases as participants skill with computers rise.

The transparency masters and template printouts are provided in the Appendicies. For convenience, each master has the appropriate chapter and step for its use. The appendicies can be reproduced as needed.

We suggest that as workshop participants begin a section that they load all the templates for that section on their desktops and then take them all off at the conclusion of the section. Participants need to be experts at loading files, saving and removing files from the desktop. Workshop leaders might prepare a single disk with selected files for only one working session to avoid confusion.

LIST OF FILES ON THE TEMPLATE DISKS

SIDE ONE

Alt.map
Coll.map.quest
Current.map
Quality.quest
Sam.alt.map.1
Sam.alt.map.2
Sam.alt.map.3
Sam.alt.map.4
Sam.alt.map.5
Sam.alt.map.6
Sam.current.map
Samp.qual.quest
Sample.quest.1
Sample.quest.2
Calculate
Collect.chart
Sam.col.chart
Sam.col.chart.1
Sam.col.chart.a
Samp.calculate

SIDE TWO

Propose.map
Sam.propose.map
Budget
Cur.guide.topic
Emphasis.areas
Emphasis.budget
Pot.emph.coll
Sam.col.chart.2
Sam.col.chart.b
Sample.budget
Sample.emph.bud
Units.titles

SIDE THREE

New.map
Sam.new.map
Samp.mats.list
Types.of.mats
Consid.acq.file
On.order.temp
Samp.acq.file.1
Samp.acq.file.2
Samp.acq.file.3
Sample.PO
Sam.col.chart.3
Sam.col.chart.c
Sample.budget
Sample.emph.bud

SIDE FOUR

Ho.1
Ho.2
Loertscher
Quality.quest
Samp.qual.quest
Tech.eval.quest
Qual.eval.ss1
Qual.eval.ss2
Samp.ql.eval.1
Samp.ql.eval.2
Tech.eval.anal
Tech.eval.samp

Chapter 1: The Collection of a School

Chapter 1

THE COLLECTION OF A SCHOOL

The single reason for building a library media collection in the school is to support the curriculum of that school.

There are many other reasons which have been set forth in the literature, but they should be subsumed by the needs of the curriculum, not separate from them. For example, young people need library collections which support their supplemental and recreational reading needs. This concern should be addressed as a part of the reading curriculum in both elementary and secondary schools. Another reason for collections often mentioned is to satisfy the personal needs of the faculty and the students. Again, these needs might be a part of the counseling program of the school.

School-based collections are very different from public library collections, even in the smallest communities. Public library collections serve personal, recreational and informational needs of the community at large. Public library collections are more diverse. School library collections are focused. While public libraries may have materials useful for the needs of students and vice versa, the primary responsibility for serving students resides with the school. Since students will not always have access to school library collections, cooperative programs between the public libraries, other libraries and the school help students make the transition to other agencies.

Over the years, many techniques for building school collections have been tried. The trend for excellence in education now demands that a more focused approach be attempted. Money spent on library media collections should have a payoff in terms of curricular benefit. If a teacher or student does not have the materials needed to learn, a quality education is in danger.

Library collections are "living" entities. This means that they need constant care and feeding if they are to provide what students and teachers need. Just as a school bus must have gasoline, oil, tires, and regular preventive maintenance, so a library media collection must be carefully pampered or it dies. The problem is, however, that static library media collections die a slow, silent death. No student is harmed physically when a needed book is not available, but a mind may be stunted - a concept may go unlearned - a literary taste impared - a career undiscovered. The tragedy of mediocre library media collections is as great as any major accident which could have been prevented.

The following standards have been designed to put full emphasis on building collections to match curriculum.

Standard 1: The collection of a library media center must support the curriculum of the school.

Indicator of Excellence: Every teacher planning a unit of instruction can expect:

a. A variety of media (print, AV and computer).

b. Materials which are current (as called for by the topic studied).

c. Materials relevant to needs.

d. Materials which are durable and in good repair.

e. Enough materials for the number of students studying the unit.

f. Materials which span the reading/viewing/listening/ comprehension levels of the students.

g. Materials which appeal to student interests.

h. Materials which span opinion/cultural/political issues if appropriate.

i. Ease of access to materials, equipment and facilities given reasonable time for planning.

j. The best of new materials purchased for the unit.

k. A professional library media specialist to aid in the planning, execution and evaluation of the unit.

Documentation: Assess how well the library media collection responds to curricular units through:

a. Post-unit evaluation.

b. Collection of evaluation statistics over a time.

Standard 2: A plan to build a curricular-oriented collection with the accompanying policies, staff expertise and realistic budgeting practices is in place.

Indicator of Excellence: Building curricular-oriented collections means:

a. There is a written collection development policy.

b. A collection map or other analysis which shows the current strengths of a collection and target areas for improvement has been created.

c. Library media specialists have the expertise to help teachers in choosing and acquiring quality materials.

d. Budgets are created which are both realistic and provide the building of emphasis areas of the collection.

1. For each medium of the collection to be supported, a budget allocation is made if required by state law or accreditation documents.

Examples:
books: $15.00 per student per year.
AV: $10.00 per student per year.

2. Actual expenditures are not made by medium (books or AV), but by collection emphasis areas. Emphasis collections could include specific units of instruction, entire courses of instruction, or new textbook adoptions.

Examples:
a. Civil War Collection.
b. Insect unit collection.
c. Science reference collection.
d. Science fiction collection.
e. Easy reading (limited vocabulary) collection.
f. A new literature textbook.

Documentation: Show that collections are curricular-oriented. Evidence could include:

a. A collection/selection policy with evidence of use.

b. Interviews/questionnaires about the quality of materials being added to the collection.

c. A collection map (or other technique).

d. A plan for future expenditures.

e. An analysis of current and previous expenditures by curricular area.

Standard 3: An acquisition system which matches curricular priorities is in place.

Indicator of Excellence: A curricular-oriented acquisition system has the following components:

a. Selection practices promote the provision of quality materials in curricular target areas.

b. Administrators and teachers help decide which areas of the curriculum will be supported by the local collection and give suggestions for specific purchases.

c. Consideration files match collection building targets.

d. Purchasing procedures match curricular schedules and needs.

e. Processing practices are timely to make new materials available for use soon after purchase.

Documentation: Show that a curricular-oriented acquisition system is in place. Records and evidence include:

a. Documents showing purchase targets.

b. Evidence that teachers and administrators participate in collection building.

c. A computerized consideration file or other consideration technique which matches collection building targets.

d. Sample purchase orders and dates of purchase.

e. Records of processing (e.g. no processing backlogs).

Standard 4: Each type of media included in the library media center is considered a system consisting of the materials, the accompanying equipment, the support staff, and facilities among other concerns.

Indicator of Excellence: For each medium chosen as a vehicle of instruction, there is:

a. A variety of materials to use.

b. The needed equipment in sufficient amounts.

c. A facility for proper use of the medium.

d. Trained personnel to help with the materials/equipment as needed.

Documentation: Assess how well each medium chosen for inclusion in the library media collection is supported.

Standard 5: Collections in single schools are constantly changing to meet current needs. Collections are supplemented from local, regional and national networks.

Indicator of Excellence: Since needs for curricular materials change over time and no school can afford to own everything, all schools:

a. Build, maintain and weed collections to meet changing needs.

b. Acquire materials and share with other schools, district centers, regional or state sources, public and academic libraries, and networks.

c. Create cooperative acquisition plans with other libraries to increase sharing and economies.

Documentation: Provide evidence that collections are ever changing and that cooperative arrangements are in place through:

a. Analysis of collection evolution.

b. Contracts and agreements with other libraries.

c. Evidence of network membership.

d. Statistics of network use and sharing by faculty, students, and curricular area.

Standard 6: Collections reflect democratic ideals, intellectual freedom and cultural diversity.

Indicator of Excellence: Grounded in the tenets of a free society, collections:

a. Span political ideas of the past with stress on the present.

b. Feed the curiosities and intellects of young people with ideas both popular and unpopular as the basis of decisionmaking in a democratic society.

c. Include materials which treat all cultural groups with dignity and respect.

Documentation: Given a current controversial topic, the library media specialist should be able to produce materials representative of the indicators above. Evidence that selection practices provide for the inclusion instead of the exclusion of a broad spectrum of opinion and culture should be prepared. Also, evidence should be available that the "School Library Bill of Rights" forms the basis of selection policies and practices.

Chapter 2: Computerized Collection Development

Chapter 2

COMPUTERIZED COLLECTION DEVELOPMENT: AN OVERVIEW

(This chapter is a part of the publication Computerized Collection Development for School Library Media Centers written by David V. Loertscher and May Lein Ho and published by Hi Willow Research and Publishing, P.O. Box 1801, Fayetteville, AR 72702-1801. $42.00 post paid)

An entire system of collection development which is linked closely to the curriculum of a school and accountable to that curriculum needs a reorientation of traditional collection development practices. In districts where there is a library media supervisor, that person may do a great deal of the background work to build a complete system for the district as a whole. The advantage of a district policy and accompanying district collection development system is that all the collections of a district can be linked together to provide a broader range of materials for less money.

The entire computerized collection development system proposed here is in four phases which may take two school years to implement:

1. Collection mapping.
2. Mapping the collection in depth.
3. The computerized acquisition system.
4. Collection evaluation.

In Phase One, the school library media center collection will be mapped to show graphically the strengths of the collection. This mapping technique is straightforward and allows the library media specialist to begin to think of collection development in a framework of curricular segments instead of a massive, too-broad view of collection building. When the library media specialist is comfortable with the collection mapping procedures, then the actual collection development system may be put in place.

Beginning with Phase Two, the proposed collection development system will focus on the needs of the curriculum, provide the computerized acquisition system (Phase Three) to fit those needs, and provide the evaluative and budgetary tools (Phase Four) needed to assess the effect of the collection on instruction.

While the following presents a brief overview of the system, two useful publications are recommended:

1. AppleWorks for School Librarians by May Lein Ho. Hi Willow Research and Publishing (P.O. Box 1801, Fayetteville, AR 72702-1801) $21.50 (post paid), 1985. Useful for those who want to learn "AppleWorks" with a template disk of examples specifically tailored to the school library media specialist.

2. Loertscher, David V., ed. "Measures of Excellence for School Library Media Centers." The Drexel Library Quarterly, Vol. 21, #2, 1985. An entire issue devoted to new evaluation measures including an in-depth article on collection mapping and a report of the research done on collection mapping in 80 schools. Two articles from this issue are available on Side Four of the accompanying template disks.

Phase One:

Collection Mapping

The library media specialist who wishes to systematically build a collection of books and audiovisual materials should remember the sage advice, "If you want to eat an elephant, cut it up into little pieces." To follow that advice, why not divide the collection into several small manageable segments which match the various parts of the curriculum? Each of these pieces could then be built, weeded or maintained as curriculum needs dictated. Each segment would have a corresponding piece of the total budget pie depending on the priorities assigned to that part of the collection, i.e., build, maintain, or de-emphasize.

For the school library media center, it would seem logical to divide collection development into three main areas: (1) The building of the collection as a whole (titled the basic collection) which serves a wide variety of interests and needs; (2) The creation of general emphasis area collections which contain materials to support whole courses of instruction or many units of instruction such as American history, science, home economics; (3) The creation of in-depth specific emphasis area collections which support single units of instruction such as Civil War, dinosaurs or cooking.

How should the system work?

Step #1: Create a collection map which will put in graphic form the various segments of the collection. A collection map is a visual supplement to the card catalog which graphically displays the breadth and depth of a library media collection. Such a map would be displayed on a large poster in the library media center for everyone to review. It would serve as a key to the collection showing strengths, collection targets, and collection size in a single chart. Also, it would show how well each of the collection segments react to curricular demands. Each school's collection map might be completely different from the collection map of a neighboring school. Several schools could coordinate their selection policies to create complementary collections which would be shared regularly.

Step #2: Evaluate how well each segment is reacting to the demands made upon it. The best evaluative tool of a collection is how it responds to teacher and student needs. Every time a major demand is placed upon one of the emphasis areas of the collection or upon the general collection, the library media specialist and the teacher should evaluate how well the collection responds. With input from the students, these two people can quickly rate the collection on a number of points which might include the following:

a. A variety of media (print, AV and computer).

b. Materials which are current (as needed by the topic studied).

c. Materials relevant to needs.

d. Materials which are durable and in good repair.

e. Enough materials for the number of students studying the unit.

f. Materials which span the reading/viewing/listening/ comprehension levels of the students.

g. Materials which appeal to student interests.

h. Materials which span opinion/cultural/political issues if appropriate.

i. Ease of access to materials, equipment and facilities given reasonable time for planning.

j. The best of new materials purchased for the unit.

The answers to these questions of quality should be translated into a gold sticker attached to the collection map for "exemplary," a silver sticker for "superior," a bronze sticker for "good," and a frowny face sticker for "major improvement needed" or "deficient."

Step #3: Create a large poster of the collection map for public display. Be sure to include both qualitative and quantitative analyses.

Step #4: Use the collection map as a planning tool, a bragging tool, a begging tool, an evaluative tool, a usage tool, and a sharing tool. A collection map which may have several or many segments could be used for: (a) showing faculty and students the strengths of a collection; (b) evaluating whether the strengths of a collection match the curriculum of a school; (c) suggesting the most logical areas of the curriculum that can be served the most effectively; (d) suggesting purchasing targets; (e) suggesting areas of the collection that might be irrelevant; and (f) demonstrating areas of need and areas of excellence.

Step #5: Build a sound acquisition program which matches the segmentation of the collection.

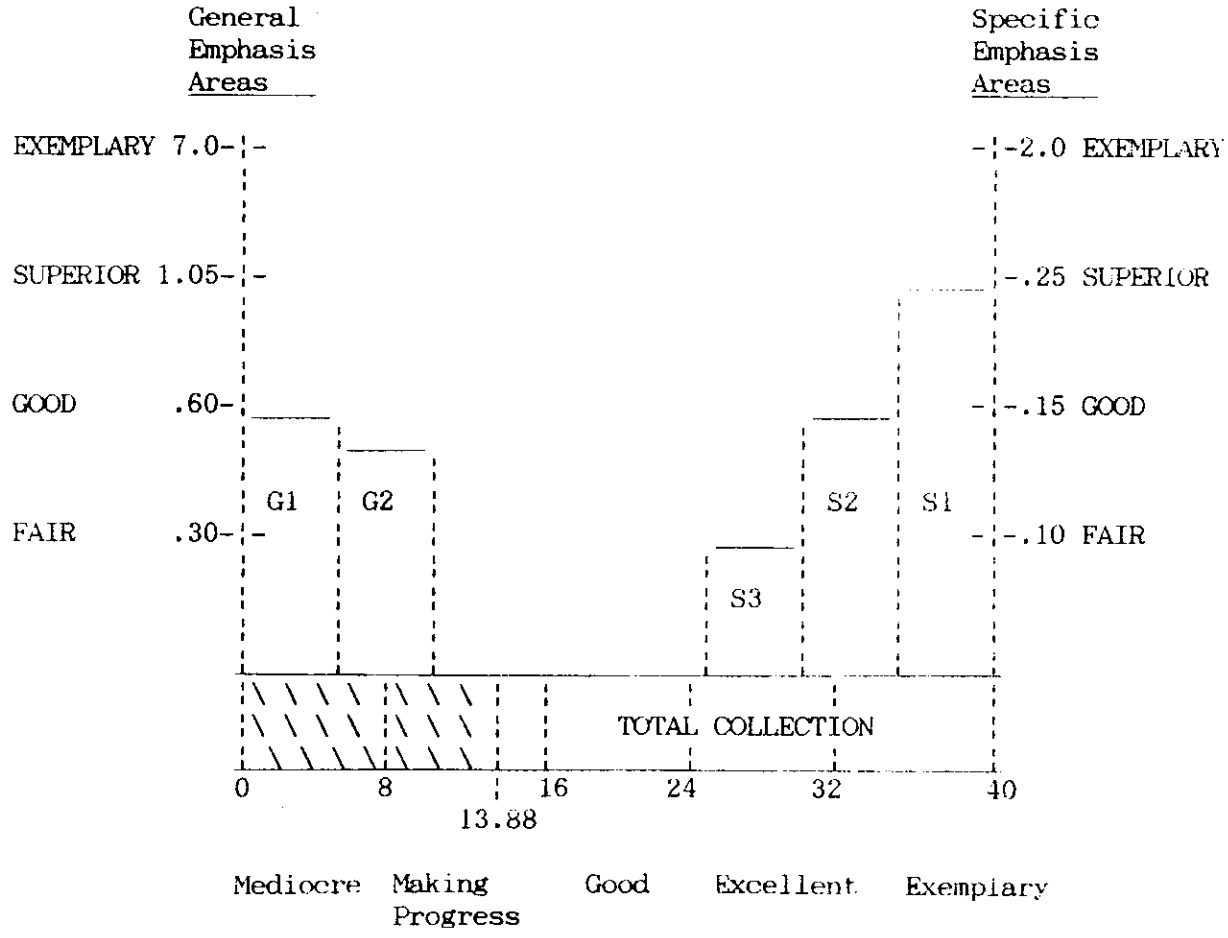
Step #6: Build a budgeting system which matches the segments of the collection map.

The following is a sample collection map which might be drawn for an elementary school. It contains general emphasis collections for folklore & fairytales and animals. Specific emphasis collections include dinosaurs, frontier & pioneer life and Indians of North America.

SAMPLE ELEMENTARY SCHOOL
CURRENT COLLECTION MAP

Date:	Sept. 5, 1986
School Name:	Washington
No. of Students:	597
Total Collection Size:	8,289
Items/student:	13.88

Emphasis Area Name	# of Items	Items/Student
G1. Folklore & fairytales	305	.51
G2. Animals	263	.44
S1. Indians of North America	150	.25
S2. Frontier & pioneer life	79	.13
S3. Dinosaurs	53	.09



(Note: All numbers charted in items per student.)

Phase Two:

Mapping the Collection in Depth

The purpose of mapping the collection in Phase One is to show the strengths of the present collection. In Phase Two, the curriculum will be analyzed and compared to the present strengths of the collection. In consultation with teachers and administrators, proposals will be made to create new emphasis collections. Then a second map titled "Proposed Collection Map" will be created to show what the collection should contain. This proposal will be matched to a realistic budget.

The procedure in brief will include:

1. Building a curricular topics master list. This would be done by consulting curriculum guides, textbooks used in the school, newly adopted texts, and actual lesson plans of teachers. Both present and future plans for curricular change should be included. This list should include the titles of all courses of instruction and all unit titles taught in those courses. For example:

   U.S. History
   - Settlement
   - Revolution
   - Civil War
   - 20th century

   Recreational Reading
   - Science fiction
   - Mysteries
   - Romance
   - Beginning readers

   Science
   - Animals
   - Plants
   - Space

2. Ranking the curriculum topics list to decide what emphasis areas should be built to support the present and future curriculum. Have administrators and teachers help decide what emphasis area collections should be built in the library media center.

3. Re-checking the current collection to see how much material is already owned in emphasis area collections.

4. Deciding the fate of the emphasis collections. Have teachers and administrators help decide what should happen to the emphasis area collections over the next few years.

5. Re-mapping the collection to include the desired emphasis areas. Include the emphasis areas from the original collection map. This second map entitled "Proposed Collection Map" will contain the current strengths and the proposed collection strengths. Present strengths will be solidly colored on the map. Proposed strengths will be represented by dotted lines.

6. Creating budget allocations for each emphasis collection from the new collection map in consultation with administrators and teachers.

   Besides emphasis collections, budget allocations will be made for "Outstanding (the best of the best published each year)," "Basic (new items which have general value across the curriculum)," and "Annual Purchases (those items that are regularly purchased, i.e., an almanac)."

Phase Three:

The Computerized Acquisition System

Since the collection map now contains both present and proposed emphasis areas, an acquisition system needs to be built which matches the map. A computerized system is recommended to help in the building of consideration files, purchase orders, received files, and budget tracking.

The procedure to summarize would include:

1. Analyzing the types of the materials to purchase for each emphasis collection. For example: for the Civil War unit, look for original source materials, materials for special learners, pictorial sources, and "range of opinion" materials to add to the present collection.

2. Preparing a spreadsheet to match the emphasis areas.

3. Selecting materials from reviews, bibliographies, previews, etc.

4. Creating an acquisition file which will also serve as the on-order file and the received file.

5. Using the power of the database to make purchase decisions and creating purchase orders from the acquisition file.

6. Recording received items in the computer file and decide the disposition of items not received.

7. Entering revised budgetary information into the spreadsheet.

8. Creating new materials announcements from the computerized file.

9. Creating a New Collection Map. This map becomes next year's current map.

Phase Four:

Collection Evaluation

As materials are acquired, the collection map will change. An evaluation system which will measure these changes should be in place. Administrators should know where the money has gone, if the money has made any difference, and how well the current collection is serving curricular needs.

The procedure to summarize will include:

1. Evidence that the collection of the library media center supports the curriculum of the school.

2. Documentation that a plan to build a curricular-oriented collection with the accompanying policies, staff expertise and realistic budgeting practices is in place.

3. Demonstration that an acquisition system which matches curricular priorities is in place.

4. Evidence that each type of media included in the library media center is considered as a system and is supported properly.

5. Confirmation that the library media collection is only one node in a network of collections which service the school.

6. Verification that the library media collection reflects democratic ideals, intellectual freedom and cultural diversity.

7. Easy-to-understand evidence of what is being spent on library media collections, how the money is being spent, what difference it is making and what should happen to the collection in the future.

The major evaluation instrument to be used in Phase Four follows.

ASSESSMENT OF THE LIBRARY MEDIA COLLECTION'S RESPONCE TO CURRICULAR DEMANDS

Directions: Together, library media specialists, teachers and students should answer the following items:

Teacher's name: _____ Lib. med. spec. name: _____
Curricular area: _____ Unit title: _____
Emphasis collection used: _____
Grade level: _____ Date evaluated: _____

1. How heavily did the collection get used for this unit?

_____ Scale: 5 = Very heavy use
4 = Heavy use
3 = Moderate use
2 = Some use
1 = Not used

_____ Actual circulation or use figures (optional)

If not used, why? _____
(Reasons for non-use may be rated in question 2)

2. How well did the emphasis collection respond to unit objectives: Rate only those that apply using the scale:

SCALE: 5 = excellent
4 = above average
3 = average
2 = below average
1 = poor

_____ Variety of media (print, AV, computer).
_____ Materials which are current (as required by the topic studied).
_____ Materials relevant to needs.
_____ Materials which are durable and in good repair.
_____ Enough materials for the number of students studying the unit.
_____ Materials which span the reading/viewing/listening/comprehension levels of the students.
_____ Materials which appeal to student interests.
_____ Materials which span opinion/cultural/political issues if appropriate.
_____ Ease of access to materials, equipment and facilities given reasonable time for planning.
_____ New materials purchased for this unit.

_____ AVERAGE RATING (include only the rated items) (can be done in the spreadsheet)

Quality rating symbol for collection map:

*** gold medal ***	5.00-4.50
** silver medal **	4.49-4.00
* bronze medal *	3.99-3.00
" frowny face "	below 3.00

3. Teaching techniques used:

4. Media activities:

   a. Information, production, research, and study skills taught (if needed):

   b. Other activities involving library media materials (brief description):

   c. How well did the activities contribute to the unit?

5. What do we need that we don't have? (books, AV, periodicals, etc.)

6. How well did the LMC staff, facilities, and equipment function?

7. How well did students respond to the LMC activities and materials?

8. What type of learners were short-changed?

9. Compliments and notes for improvement?

Topical Index to the Template Disks

The template disks have been set up so that each procedure has two templates provided: a blank template and a sample template. The sample templates follow the entire process with a sample elementary school collection.

In the index below, each template is followed by a brief annotation which indicates how the template is to be used.

Chapter 3 Phase One COLLECTION MAPPING

Useful templates on Side One of the template disks:

Step 1, Part 1 Complete the Collection Map Questionnaire

Coll.map.quest - A blank collection map questionnaire for compiling collection statistics.

Sample.quest.1 - A filled-in collection map questionnaire for the Sample School.

Calculate - A simple spreadsheet used for calculating collection size and number of items per student.

Samp.calculate - A sample spreadsheet calculating the collection size and number of items per student in the Sample School.

Collect.chart - A giant spreadsheet containing three sub-sections. The "CURRENT COLLECTION CHART" section will be used to record what emphasis collections a school already owns.

Sam.col.chart - A practice spreadsheet for entering collection and emphasis area data.

Sam.col.chart.1 - A finished spreadsheet with the "CURRENT COLLECTION CHART" section filled in for the Sample School.

Step 1, Part 2 Create the Collection Map

Current.map - An outline of a collection map with no bars drawn.

Sam.current.map - A collection map drawn for the Sample School.

Step 2 Evaluate the Quality of the Segments Represented on the Collection Map

Quality.quest - A blank questionnaire to be used in rating the quality of the collection's response to user demands.

Samp.qual.quest - A filled-in questionnaire containing quality ratings for the Sample School.

Step 3 Create a Public Collection Map

Sam.current.map - A completed collection map for the Sample School.

Step 4 Use the Collection Map

Step 5 Build a Sound Acquisition Program

Step 6 Build a Budgeting System

Alternative Map #1: Charted as items/#students who use the topic

Coll.map.quest - A questionnaire used previously in the chapter.

Sample.quest.2 - A sample questionnaire including data for the alternative mapping technique.

Sam.col.chart - A practice spreadsheet for entering collection and emphasis area data.

Sam.col.chart.a - A spreadsheet containing information for the alternative mapping technique.

Alt.map - A blank map with alternate scales for use in alternative mapping technique #1.

Sam.alt.map.1 - An alternative collection map drawn for the Sample School.

Alternative Map #2: Quality vs. quantity on the same map

Sam.alt.map.2 -- A sample map used alternative mapping method #2.

Alternative Map #3: Mapping a specific emphasis collection for quality and quantity

Sam.alt.map.3 -- A sample map used alternative mapping method #3.

Alternative Map #4: Mapping an entire course by unit of instruction

Sam.alt.map.4 -- A sample map used alternative mapping method #4.

Alternative Map #5: Mapping a type of AV media

Sam.alt.map.5 -- A sample map used alternative mapping method #5.

Alternative Map #6: Draw a positive/negative collection map

Sam.alt.map.6 -- A sample map used alternative mapping method #6.

Alternative Map #7: Use computer graphing packages

Chapter 4 Phase Two MAPPING THE COLLECTION IN DEPTH

Useful templates on Side Two of the template disks:

Step 1 Build a Curricular Topics Master list

Emphasis.areas - A file containing a list of all the emphasis collections declared by the participating schools in the Ho-Loertscher research.

Pot.emph.coll - A potential emphasis area collection spreadsheet (used as a database) useful in compiling a list of every topic studied in the school and its accompanying emphasis area title.

Units.titles and **Cur.guide.topic** - Two spreadsheet examples, the first contains textbook chapter titles and the second includes curriculum guide topics.

Step 2 Rank the Curriculum Topics List

Pot.emph.coll - A potential emphasis area collection spreadsheet (used as a database) useful in compiling a list of every topic studied in the school and its accompanying emphasis area title.

Units.titles and **Cur.guide.topic** - Two spreadsheet examples, the first contains textbook chapter titles and the second includes curriculum guide topics.

Step 3 Re-check Your Current Collection

Collect.chart * - A giant spreadsheet containing three sub-sections. The "PROPOSED PURCHASE CHART" section will be used to record what emphasis collections a school wishes to build.

Sam.col.chart * - A sample spreadsheet to be used for practice.

Sam.col.chart.2 - A completed spreadsheet showing the "PROPOSED PURCHASE CHART."

Step 4 Decide the Fate of the Emphasis Collections

Collect.chart * - A giant spreadsheet containing three sub-sections. The "PROPOSED PURCHASE CHART" section will be used to record what emphasis collections a school wishes to build.

Sam.col.chart * - A sample spreadsheet to be used for practice.

Sam.col.chart.2 - A completed spreadsheet with first two sections filled in for the Sample School.

Sam.col.chart.b - A completed spreadsheet used for alternative mapping technique #1 for the Sample School.

Step 5 Re-map the Collection

Collect.chart * - A giant spreadsheet containing three sub-sections. The "PROPOSED PURCHASE CHART" section will be used to record what emphasis collections a school wishes to build.

Propose.map - A skeleton map ready for drawing bars for emphasis collections.

Sam.Propose.map - The collection map for the Sample School.

Step 6 Create a Realistic Budget

Budget - A template created for a traditional line item budget with columns for expenditures for books, audiovisual materials, equipment and supplies.

Sample.budget - A sample traditional budget for the Sample School.

Emphasis.budget - A template created to budget for each emphasis collection plus columns for basic, outstanding and annual purchases.

Sample.emph.bud - A sample emphasis collection budget for the Sample School.

* Note: The original **Collect.chart** and **Sam.col.chart** templates were saved on Side One of the template disks. In Phase One (Chapter 3, Step 1, Part 1), the CURRENT COLLECTION CHART section was used to analyze the current collection and the revised templates were saved on Side One and Side Two. Therefore, in Phase Two, the templates on Side Two with the CURRENT COLLECTION CHART section already filled in should be used.

Chapter 5 Phase Three THE COMPUTERIZED ACQUISITION SYSTEM

Useful templates on Side Three of the template disks:

Step 1 Analyze the Types of Materials to be Purchased for Collections

Types.of.mats - A word processed file which contains suggestions from various curricular areas of the types of materials which might be purchased for an emphasis collection.

Samp.mats.list - A word processed file which contains the decisions made by teachers and library media specialists for building emphasis collections in the Sample School.

Step 2 Prepare a Spreadsheet

Emphasis.budget and **Sample.emph.bud** on Side Two of the template disks.

Step 3 Selecting Materials

Types.of.mats - A word processed file which contains suggestions from various curricular areas of the types of materials which might be purchased for an emphasis collection.

Samp.mats.list - A word processed file which contains the decisions made by teachers and library media specialists for building emphasis collections in the Sample School.

Step 4 Create a Computerized Acquisition File

Consid.acq.file - The blank template used by an actual school to enter materials for purchase consideration.

Samp.acq.file.1 - The Sample School consideration file used for practice entering of items from reviews.

Step 5, Part 1 Use the Power of the Database to Make Purchase Decisions

Consid.acq.file - The consideration database file with materials entered for purchase decisions.

Samp.acq.file.1 - The Sample School consideration file for practicing the Boolean searching.

Step 5, Part 2 Create Purchase Orders

Consid.acq.file - The blank template used by an actual school to enter materials for purchase consideration.

On.order.temp - A temporary file used to store only items for a current purchase order.

Samp.acq.file.2 - The Sample School consideration file including purchase decisions for an order dated Apr 86.

Sample.PO - A copy of only those materials from the **Samp.acq.file.2** which are ready to print out for a purchase order.

Step 6 Receive Items

Consid.acq.file - The database which should now contain both materials being considered for purchase and those which are on order.

Samp.acq.file.3 - The Sample School database which shows items which are being considered for purchase, those which are on order, and those which are received.

Step 7 Bring the Budget Spreadsheet Up to Date

Budget * - The traditional budget which divides expenditures according to purchasing accounts, e.g., books, audiovisual, etc.

Sample.budget - The Sample School traditional budget.

Emphasis.budget * - A budget which is divided according to the emphasis collections, basic, outstanding and annual purchases.

Sample.emph.bud - The Sample School budget which is divided according to emphasis collections.

Step 8 Create New Material Lists

Consid.acq.file - This database now contains materials for purchase consideration, materials listed as on order, and materials that have been received.

Samp.acq.file.3 - The Sample School database containing considerations, on order, and received items.

Step 9 Create a New Collection Map

Collect.chart * - The giant spreadsheet which has the sections CURRENT COLLECTION CHART and PROPOSED COLLECTION CHART plus the section which will be used now: NEW COLLECTION CHART.

Sam.col.chart * - A practice spreadsheet with data added from Phases One and Two.

Sam.col.chart.3 - A sample spreadsheet with data filled in all three sections.

Sam.col.chart.c - A sample spreadsheet used for alternative mapping technique #1.

New.map - A blank template for use in an actual school.

Sam.new.map - A new collection map for the Sample School.

* Note: The original Budget and **Emphasis.budget** templates were saved on Side Two of the template disks. In Phase Two (Chapter 4, Step 6), the initial budget was entered in these two spreadsheets. The templates were then saved on Side Two and Side Three. In Phase Three, the revised versions on Side Three should be used.

The original Collect.chart and Sam.col.chart templates were saved on Side One of the template disks. In Phase One (Chapter 3, Step 1, Part 1), the CURRENT COLLECTION CHART section was filled in and saved on Side One and Side Two. In Phase Two (Chapter 4, Step 4), the PROPOSED COLLECTION CHART section was filled in, then the revised templates were saved on Side Two and Side Three. In Phase Three (Chapter 5, Step 9), the revised version on Side Three should be used to analyze data in the NEW COLLECTION CHART section.

Chapter 6 Phase Four COLLECTION EVALUATION

Useful templates on Side Four of the template disks:

Step 1 Evidence that the Collection Supports the Curriculum

Quality.quest - A post-unit evaluation form to be filled out by the teacher and the library media specialist.

Samp.qual.quest - A sample post-unit evaluation from the Sample School.

Qual.eval.ss1 - A spreadsheet in which to record the data from each unit evaluation done by the library media specialist and the teacher.

Samp.ql.eval.1 - A spreadsheet from the Sample School which includes post-unit evaluation data.

Qual.eval.ss2 - A spreadsheet designed to analyze post unit evaluation data for a single department or topic in the curriculum.

Samp.ql.eval.2 - A spreadsheet from the Sample School which includes post-unit evaluation data for the science curriculum.

Step 2 Evidence of a Collection Building Plan

Step 3 An Appropriate Acquisition System

Step 4 Each Type of Media as a System

Tech.eval.quest - A blank technology evaluation questionnaire used to evaluate how well the educational technology is receiving in a school.

Tech.eval.anal - A spreadsheet used to analyze data from the technology evaluation questionnaire.

Tech.eval.samp - A sample spreadsheet used to analyze data from the technology evaluation questionnaire.

Step 5 Local Collections and Networks

Step 6 Collection Diversity

Step 7 Easy-to-Understand Evidence

Chapter 3:
Collection Mapping

Chapter 3

Phase One

COLLECTION MAPPING

The person approaching collection mapping for the first time should re-read the section in Chapter 2 entitled "Phase One: Collection Mapping" in order to get an overview of the system. The purpose of this chapter is to build a working knowledge of Phase One of the collection development process. This phase of collection mapping should be thoroughly understood before going on to the second phase. Briefly, during the first phase, the library media specialist will:

1. Fill out the Collection Map Questionnaire. (Estimating titles and number of items is better than exact counts).

2. Enter the counts into the "Collect.chart" spreadsheet on the template disk.

3. Evaluate the quality of the collection segments charted in the collection map.

4. Create a collection map for public display.

5. Use the collection map in collection building.

6. Consider alternative collection mapping strategies.

Complete the Collection Map Questionnaire

Useful templates on Side One of the template disks:

Coll.map.quest - A blank collection map questionnaire for compiling collection statistics.

Sample.quest.1 - A filled-in collection map questionnaire for the Sample School.

Calculate - A simple spreadsheet used for calculating collection size and number of items per student.

Samp.calculate - A sample spreadsheet calculating the collection size and number of items per student in the Sample School.

Collect.chart - A giant spreadsheet containing three sub-sections. The "CURRENT COLLECTION CHART" section will be used to record what emphasis collections a school already owns.

Sam.col.chart - A practice spreadsheet for entering collection and emphasis area data.

Sam.col.chart.1 - A finished spreadsheet with the "CURRENT COLLECTION CHART" section filled in for the Sample School.

In this step, the library media specialist will collect statistics about the present collection.

The collection map questionnaire to be used in assessing the present collection contains some common terms but many of them are open to interpretation. The following definitions are recommended:

1. Total collection size: The approximate total number of items in the collection.

2. General emphasis collection: A general emphasis collection is a group of materials which supports a course of instruction in a school such as home economics, American history or Western art. A number of units of instruction are taught out of a general emphasis collection. The collection can be multimedia or a single medium.

3. Specific emphasis collection: A specific emphasis collection is a group of materials which supports a single unit of instruction. It can be multimedia or a single medium. Examples are: Civil War, cookbooks, American poetry, dinosaurs, and American painting.

Collection Map Questionnaire

General Information

1. School Name _____
   Your Name _____
   School Address _____
   School Phone _____
2. Grade levels included in your school _____
3. Total number of students in your school _____

Total Collection Size

Estimate the total number of items in each Dewey Classification *

Reference _____	400 _____	Biography _____
000 _____	500 _____	Fiction _____
100 _____	600 _____	Story Collection _____
200 _____	700 _____	Easy (Elem. only) _____
300 _____	800 _____	Periodicals _____
398.2 _____ (Elem. only)	900 _____	Prof. Collection _____

Total # of items _____ (can be done in the spreadsheet)
Total # of items per student _____ (can be done in the spreadsheet)

Emphasis Areas

Area Name	General or Specific	# of items	items/ student	# of students who use this topic	items/ student who use
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

(Items/student and items/student who use the topic can be done in the spreadsheet.)

* Many schools have counts segmented by Dewey classes for state reports. If not easily available, a total collection size is all that is essential.

Suggested rules for entering collection size:

1. Include print and AV materials.
2. Include duplicates.
3. Count sets as one item.
4. Count a periodical subscription as one item.
5. Include reference books as part of emphasis collections.
6. Include the number of vertical file folders if appropriate.
7. Estimate rather than count the items exactly.

But before doing your own school, you may wish to work with the sample school.

Working with the Sample School

Objective: To complete the collection map questionnaire.

1. Load **Coll.map.quest** from the template disk and print this file out.

2. Load the template **Sample.quest.1** from the template disk.

3. Study the data from the Sample School. Notice that total # of items, total # of items per student, and items/student column in Emphasis Areas section can be calculated in the spreadsheet titled **Collect.chart** or done by hand with a calculator.

4. Two ways of figuring items/student are presented. At this point, only the first two columns have been used: "# of items" and "Items/student." The other columns match an alternative collection mapping technique which will be presented later.

5. Now copy the data from **Sample.quest.1** on to your printout, leaving those that can be calculated in the spreadsheet blank.

For an actual school, load **Coll.map.quest**. Print this file out and fill in the questionnaire. For those than can be done in the spreadsheet, you can leave them blank temporarily. When recording the Emphasis Areas, ignore the last two columns: "# of students who use this topic" and "Items/student who use." These will be used later. Your printout should look like the following page:

Even if the division in the above questionnaire is done by hand, it needs to be entered in the **Collect.chart** spreadsheet. But before doing that, you may wish to work with the Sample School.

Working with the Sample School

Objective: To enter the data from the collection map questionnaire into the spreadsheet.

1. Load the template **Calculate** from the disk.

2. Fill in the following data in column B:

Cell B7	=	259
Cell B8	=	86
Cell B9	=	39
Cell B10	=	56
Cell B11	=	407
Cell B12	=	305
Cell B13	=	110
Cell B14	=	1112
Cell B15	=	499
Cell B16	=	516
Cell B17	=	247
Cell B18	=	981
Cell B19	=	496
Cell B20	=	1343
Cell B21	=	61
Cell B22	=	1643
Cell B23	=	19
Cell B24	=	112
Cell B26	=	597

After the data are entered:

Cell B28 should equal 8289. If not, check your figures.
Cell B29 should equal 13.88

Load the template **Samp.calculate** from the template disk. The template **Calculate** should look exactly like the **Samp. calculate** template.

3. Write down the total # of items and total # of items per student on the collection map questionnaire.

4. Load the template **Sam.col.chart** from the disk.

5. This is a giant three-part spreadsheet. You will be using only the left third at this time. It is titled: "CURRENT COLLECTION CHART." Place your cursor on the upper left hand corner of the spreadsheet

(Use Open Apple 1 and then the left arrow to get there). Read the spreadsheet to become familiar with it.

6. Now enter the following information in the appropriate cells:

Cell B9 = 597
Cell B10 = 8289
Cell B13 = 1
Cell B29 = 305
Cell B30 = 263
Cell B40 = 150
Cell B41 = 79
Cell B42 = 53

7. The spreadsheet should automatically calculate the number of items per student. How? (it's magic!) If cell B13 has a "1" entered, then the items/student column D will contain the number of items for the topic divided by the total number of students in the school recorded in cell B9. If there is a "2" in cell B13, an alternative calculation method will be used (see Alternative Map #1).

8. After you have entered the numbers above, save the spreadsheet both on Side One and Side Two of the template disks! (Press Open Apple S). You will need the data you just entered later. The result should look like **Sam.col.chart.1** on the template disk. Remember that since you have now modified the template disk, anyone wishing to use the instructions for the first time will have to use a new copy of the template disk made from the original in the book.

9. Copy the figures from the items/student column in the spreadsheet on to the appropriate column in the collection map questionnaire.

For an actual school, load the "Collect.chart" from the template disk. Enter the data asked for in the spreadsheet section entitled: CURRENT COLLECTION CHART. Please put a "1" in cell B13 of the spreadsheet. Write the results in the collection map questionnaire. The spreadsheet automatically divides the number of items by the total # of students in the school unless you dictate otherwise. Do not fill in the column labeled "Students who use." This column will be used later in an alternative method.

You may, of course, easily tally the items/student by hand, but please enter your data in the spreadsheet Collect.chart for further use.

Be sure to save your data in Collect.chart both on Side One and Side Two of the template disks.

Create the Collection Map

Useful templates from Side One of the templates disk:

Current.map - An outline of a collection map with no bars drawn.

Sam.current.map - A collection map drawn for the Sample School.

The objective for this step is to draw a collection map on a regular sized piece of paper.

Use the data you recorded on the collection map questionnaire to create a collection map. The chart for the map is in a word processing file titled "**Current.map**" on the template disk. Print it out. "AppleWorks" will not draw a collection map for you. Print out the "**Sam.current.map**" on the template disk or use the sample map in Chapter Two as a guide to draw your own map. Copies of the map and sample map plus the calculation spreadsheet are included in Appendix Three. Note that you will need to fill in the top part of the collection map when you print out **Current.map**. You can either type in the information or retrieve it via the clipboard from the "CURRENT COLLECTION CHART" section in the **Collect.chart** (**Sam.collect.chart** for the Sample School).

Adjust the map until you are confident that it reflects your collection strengths in terms of quantity of materials. The scales on the collection map chart may need adjustment, counts of materials may be wrong, there may be other emphasis areas which were neglected the first time around.

The three sets of scales used in the map seem to work well for schools with student populations from 500 - 1,000. Smaller schools will need to increase the size of the scales (double them as a trial) and large schools should decrease scale sizes (cut them in half as a trial).

The scales used in the **Current.map** and **Sam.current.map** on the template disk have come from the research on collection mapping done in 80 cooperating schools. The basic collection size scale (0 - 40) comes from the 1975 Media Programs: District and School published by AASL. The other scales come from the research schools. When your collection is charted using the suggested scales, you are comparing your emphasis collection sizes to those of the research schools. The scales have unequal segments because a quartile division method was used to analyze collection size in the research schools rather than averages. See the Ho article in Drexel Library Quarterly cited in the introduction and on Side Four of the template disks for details.

Step 2

Evaluate the Quality of the Segments Represented on the Collection Map

Useful templates from Side One of the template disks:

Quality.quest - A blank questionnaire to be used in rating the quality of the collection's response to user demands.

Samp.qual.quest - A filled-in questionnaire containing quality ratings for the Sample School.

A collection of materials is a quality collection only if it meets the demands placed upon it by teachers and students. While any collection may fail on a particular demand, on the whole, it should respond well for normal curricular needs.

Every time a significant demand for materials is placed upon a collection, the library media specialist should rate the response of the collection to the demand. The demand can be from teachers or students. Certainly, every time an emphasis area of the collection is used to any great extent, a quality evaluation should be done of its response.

Use the **Quality.quest** form on the template disk to assist you in rating the collection. A **Samp.qual.quest** form on the template disk has been filled in as a sample to study. Create your own version of the form for local use. Copies of the forms are included in Appendix Three. (Note: Chapter 6, Step 1 describes in details how to analyze the quality questionnaire.)

Rating the quality of a collection takes time. It can be done only <u>after</u> collection demands are made and filled. It may take a full school year before all the emphasis collections on the collection map are evaluated.

At the completion of the quality evaluation, translate the ratings into a gold sticker to be attached to the collection map for "exemplary," a silver sticker for a "superior" response, a bronze sticker for a "good" response, and a frowny face sticker for "major improvement needed" or "deficient." Recognize that the quality evaluation will change as an emphasis area is weeded or improved. A stagnant collection will probably get a poorer rating as time passes.

The possibility exists that a collection rated deficient last year may get an excellent rating this year. In this case, the teacher may have changed, the curriculum changed, or demands upon that collection segment have changed. The library media specialist should take the broad view of change into account as collection segments are built or weeded.

Create a Public Collection Map

Useful templates from Side One of the template disks:

Sam.current.map - A completed collection map for the Sample School.

In Step 3, the objective is to create a poster-sized map. Draw a large collection map for your patrons to view. This should contain not only the bar chart but also the qualitative stickers. Such a map may be created right after Step One and modified as the year progresses. The large poster-size map should be colorful and hung in a prominent place in the library media center. It becomes a focal point of any tour of the library media center so that the strengths of the collection are pointed out to students, teachers, administrators and parents as a part of normal orientation. The map on the next page is a sample current collection map with qualitative information. The library media specialist can use colored stickers to indicate the qualitative ratings.

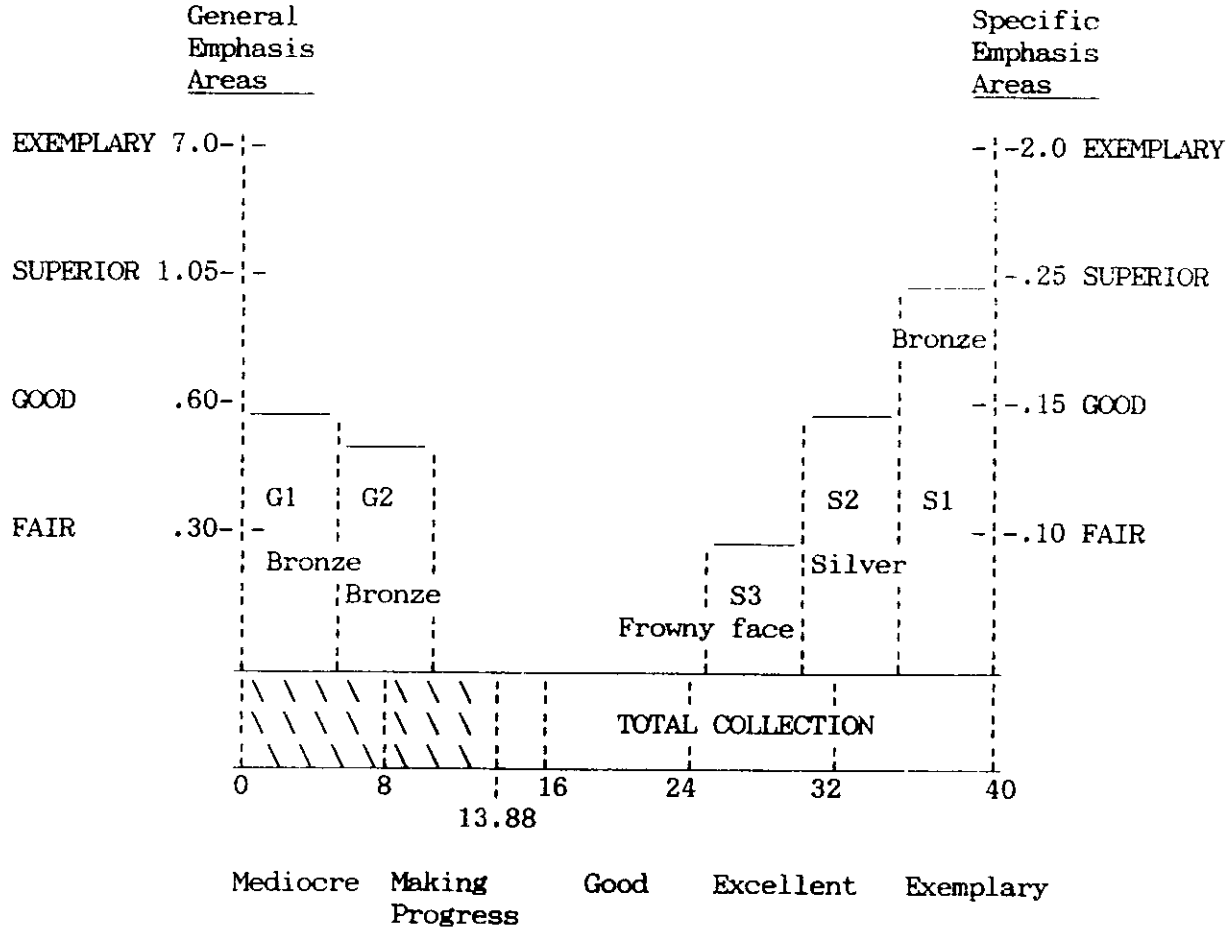
Varying the scales used

The scale chosen for collection maps is a professional decision and one that should be made carefully. Scales with small intervals emphasize small increases in the size of collections. Large interval scales de-emphasize collection size. Lots of experimentation is necessary before selecting a scale for use. Different scales may be used for different audiences to present information which illustrates the point under discussion or provides evidence of collection trends. It is possible, of course, to "lie with statistics." Library media specialists need to present the public and decision-makers with the best professional analysis of collection strengths and needs. Varying graphical techniques and choosing appropriate scales which convey an accurate picture is essential.

SAMPLE ELEMENTARY SCHOOL
CURRENT COLLECTION MAP

Date:	Sept. 5, 1986
School Name:	Washington
No. of Students:	597
Total Collection Size:	8,289
Items/student:	13.88

Emphasis Area Name	# of Items	Items/Student
G1. Folklore & fairytales	305	.51
G2. Animals	263	.44
S1. Indians of North America	150	.25
S2. Frontier & pioneer life	79	.13
S3. Dinosaurs	53	.09



(Note: All numbers charted in items per student.)

Use the Collection Map

The introductory article in Chapter Two mentioned a few of the possibilities for the use of a collection map. These points need repeating here. Library media specialists should devise strategies to get the most political and budgetary clout from the technique. The collection map can be used as:

a. A bragging tool: Show the administrators, faculty, students and parents the strengths of a collection. Those collection segments not pictured are weaknesses. Could these be charted too?

b. An evaluation tool: Evaluate whether the strengths of a collection match the curriculum of a school. If there is a mismatch, why?

c. A usage tool: The strengths of a collection are the most logical areas of the curriculum that can be served the most effectively. Is that happening? Why or why not?

d. A planning tool: Suggest possible purchasing targets. Have administrators and teachers assist in deciding what targets to pursue. What new emphasis areas should be created? Which areas are already good but will require regular updating? Given the current funding, which collection segments should receive priority?

e. An evaluation tool: Suggest parts of the collection which are irrelevant. Why? Should this segment of the collection be discarded, traded, or the curriculum be changed to take advantage of it? Is this part of the collection likely to be of value in the future? Worth saving?

f. A planning tool: Demonstrate areas of need and areas of excellence. Create a grant proposal? Ask for special funding for certain collection segments? Draw major attention to collection strengths?

g. A sharing tool: Exchange 8 1/2" x 11" maps with other libraries for interlibrary loan purposes.

Build a Sound Acquisition Program

Consideration files should be built to match the collection building targets decided upon by the library media specialist, the teachers and the administration. It is probably easier to track collection segments if orders are divided into segments. For example, all social studies materials would be ordered together, all science...

In Phase Three of the collection development system, an entire system to track the collection and acquire materials is provided.

Step 6

Build a Budgeting System

Instead of having one pot of money from which purchases would be made, it would seem more appropriate to divide the total budget into segments which match collection building targets. Administrators, teachers and the library media specialist could decide on such allocations. Allocations might be made for:

a. The reference collection.
b. The periodical collection.
c. The best of the best published each year.
d. Emphasis collections (each with a separate allocation).

The fiction or picture book collections could receive allocations depending on which part of the curriculum they serve.

Additional helps and a computerized budgeting system are given in Chapter Five.

There are a number of alternative ways to picture collections and collection segments. A few ways are suggested here. The creativity and imagination of the library media specialist should be used to map the collection in ways meaningful to students, teachers, administrators, parents and school board members. There are many, many charts and graphs drawn in national publications such as "Newsweek," "Time," and "USA Today." These publications can be used for ideas on communicating effectively.

Consider the following techniques:

Alternative Map #1: Charted as items/# students who use the topic

Useful templates from Side One of the template disks:

Coll.map.quest - A questionnaire used previously in the chapter.

Sample.quest.2 - A sample questionnaire including data for the alternative mapping technique.

Sam.col.chart - A practice spreadsheet for entering collection and emphasis area data.

Sam.col.chart.a - A spreadsheet containing information for the alternative mapping technique.

Alt.map - A blank map with alternate scales for use in alternative mapping technique #1.

Sam.alt.map.1 - An alternative collection map drawn for the Sample School.

One of the most requested alternative ways of charting the data has been to create a map which charts the items held as a function of the number of students who generally need to use an emphasis area. For example, all eleventh grade students study U.S. history but only a class of 25 study drafting. The number of items needed in U.S history will be greater than in drafting to achieve the same degree of depth.

While this technique involves more estimates and a little more calculation, it is still relatively easy to construct and may be more accurate in some schools - particularly where there are a lot of specific emphasis collections which match units of instruction studied only by a fraction of the entire students. This mapping strategy will be good in schools that have a wide variety of course offerings such as in vocational schools. The library media specialist might map the collection both ways and then select the map which, in the professional judgment of the specialist, gives the most accurate picture.

To accommodate this method, the data from the schools which participated in the Ho-Loertscher research were re-analyzed and recharted. New map scales were developed using the same quartile method. In addition, the collection map questionnaire and the templates on the disk were modified to include the alternative data.

To map the Sample School data using this alternative method, follow these steps:

1. Estimate the number of students who would actively use a collection segment because of curricular requirements even though all students would have access to that collection. Many general emphasis collections might be used by the entire student population.

   Useful definitions in the collection map questionnaire:

   a. Items/student - The number of items in that topic divided by the total number of students in the school.
   b. Students who use this topic - The number of students who would normally be assigned to use materials on this topic.
   c. Items/student who use - The number of items in that topic divided by the number of students assigned to use materials on this topic.

2. Load **Sam.col.chart** from the template disk. Enter the following:

   ```
   Cell B13 =   2   (This is very important!)
   Cell C29 = 350
   Cell C30 = 597
   Cell C40 =  80
   Cell C41 =  60
   Cell C42 =  60
   ```

   Notice that the items/student has been recalculated.

   The result should look like **Sam.col.chart.a**.
   Do not save the changed data in **Sam.col.chart** since the entire manual is based on the original, not this alternative method.
   Copy the data for the "# of students who use this topic" and "items/student who use" on to the "Collection Map Questionnaire."

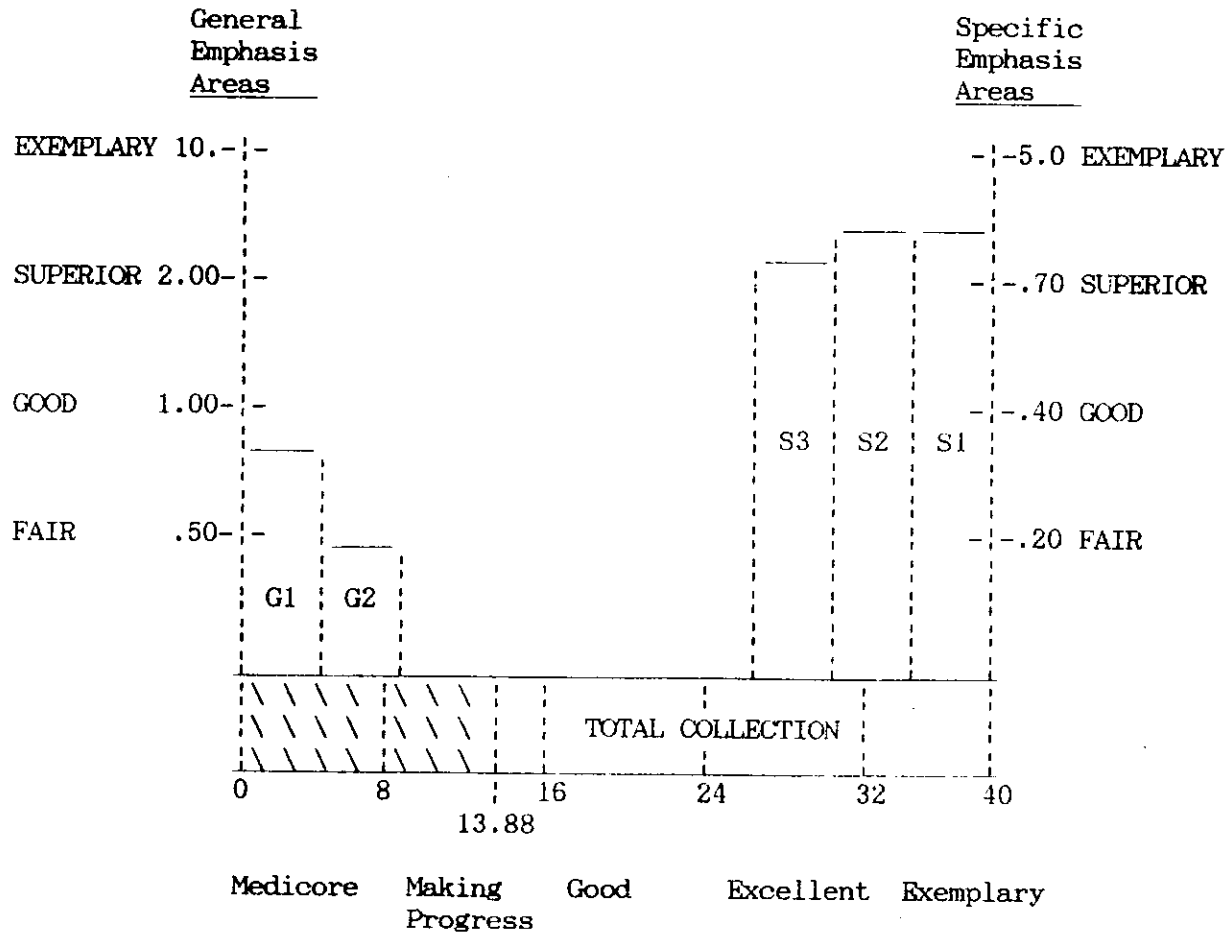
3. Load the template **Sample.quest.2** from the template disk. Notice that the columns "# of students who use this topic" and "items/student who use" are already filled in.

4. Print out the **Alt.map** from the disk and chart the data. The result should look like the file **Sam.alt.map.1** on the template disk. A copy follows:

SAMPLE ALTERNATIVE COLLECTION MAP

Date: Sept. 6, 1986
School Name: Washington
No. of Students: 597
Total Collection Size (Items/Student): 8,289 (13.88)

Emphasis Area Name	# of Items*	# of Students Who Use**
G1. Folklore & fairytales	305 (.51)	350 (.87)
G2. Animals	263 (.44)	597 (.44)
S1. Indians of North America	150 (.25)	80 (1.88)
S2. Frontier & pioneer life	79 (.13)	60 (1.32)
S3. Dinosaurs	53 (.09)	60 (.88)



Note: * Figures in parentheses indicate # of items/total # of students.
** Figures in parentheses indicate # of items/students who use the topic.

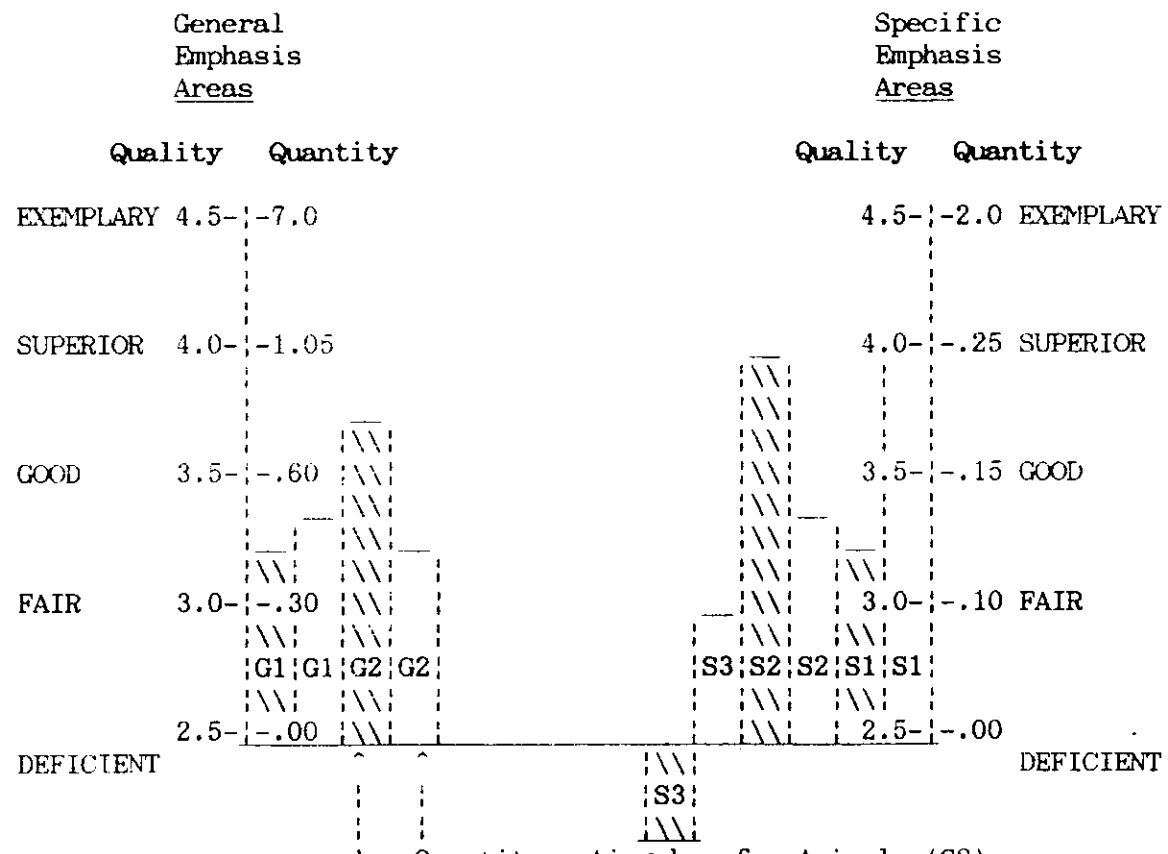
Interpretation: The general emphasis collections are similar in size to those charted in the original collection map, but the specific emphasis collections are all in the superior range considering the number of students who make demands on those segments of the collection.

Alternative Map #2: Quality vs. quantity on the same map

Instead of using gold stickers to denote quality on a collection map, a side-by-side map could be constructed. The quality scale can be adjusted to match the scales on the regular collection map with "deficient" falling below the line. The result would look like the following map (Sam.alt.map.2 on Side One the template disks):

COLLECTION MAP
QUALITY AND QUANTITY

Emphasis Area Name	# of Items	Items/Student
G1. Folklore & fairytales	305	.51
G2. Animals	263	.44
S1. Indians of North America	150	.25
S2. Frontier & pioneer life	79	.13
S3. Dinosaurs	53	.09



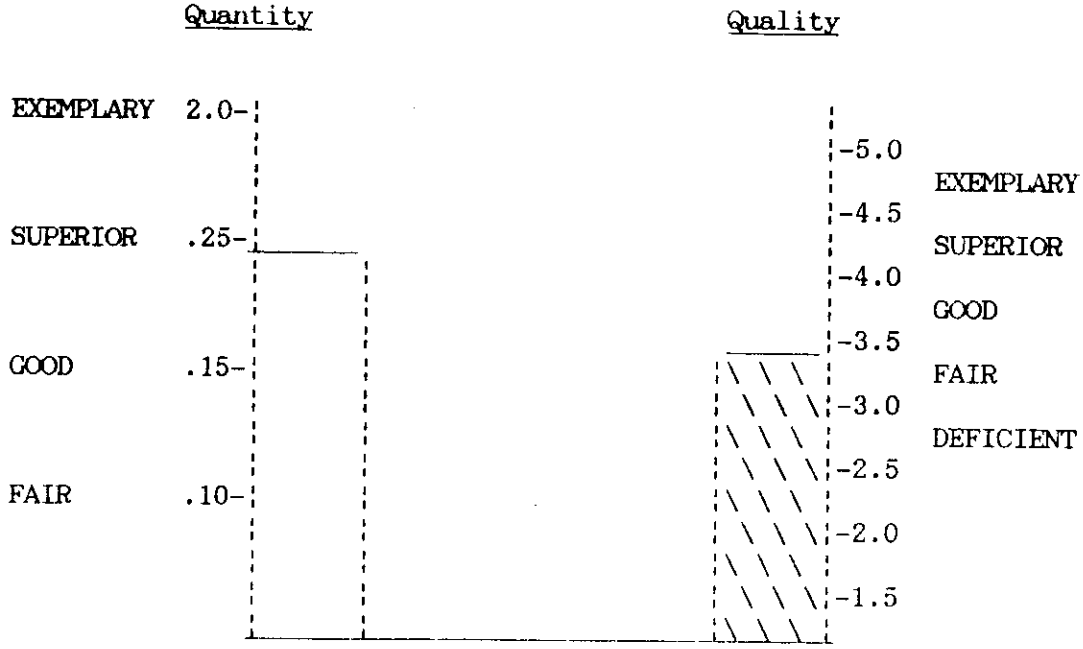
Note: Quantity rating bars were charted by items/student.
Quality rating bars indicated the average quality as rated by students and teachers.

Interpretation: The map shows that the folktale collection is rated "fair" in terms of quantity and quality. The animal collection is of good quality but needs to be larger. Materials are plentiful for the study of Indians of North America but lack much in quality. In contrast, the materials about frontier and pioneer life are rated almost "superior" by those who use them. A major effort to raise the quality rating for the dinosaur collection needs to be made.

Alternative Map #3: Mapping a specific emphasis collection for quality and quantity

A single emphasis collection might be mapped to include both quality and quantity ratings. The following map demonstrates how well the Indians of North America collection has served the curriculum (**Sam.alt.map.3** on Side One of the template disks).

INDIANS OF NORTH OF AMERICA COLLECTION



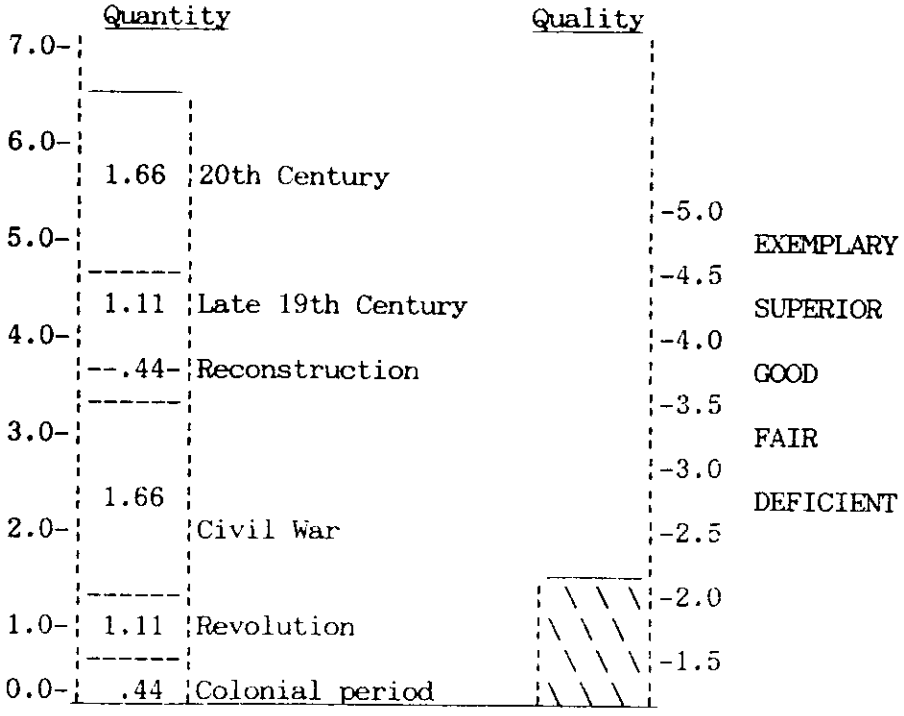
Total # of items = 150
# of students = 597
Items/student = .25

Interpretation: The size of the Indians of North America collection reaches to the "superior" range but its quality is somewhat lacking. The collection may have many worn-out and unattractive items. An effort might be made to repair the collection with a team of volunteer students and parents. The art teacher may have students design original book covers indicative of the contents and have students cover them with plastic jackets. Another effort would be made to weed the collection and purchase sufficient new materials to get the quality ratings at least in the "good" to "superior" range.

Alternative Map #4: Mapping an entire course by unit of instruction

At times, an entire course of instruction might be evaluated to show how the collection responds to curricular demands. Such a study might be done just as a major curricular change is anticipated. The following map shows how well the U.S. History collection has responded to the past curriculum (Sam.alt.map.4 on Side One of the template disks).

U. S. HISTORY COLLECTION



Items/student Using each segment of U.S. History

Average quality of U.S. History as rated by students and teachers

Total Items = 1160
# of students using U.S. History = 180
Items/student using U.S. History = 6.44

Interpretation: The U.S. History collection is rather large but is rated consistently deficient by the users of the collection.
Conclusion: A major collection renewal program should be launched to include heavy weeding and major budgetary expenditure.

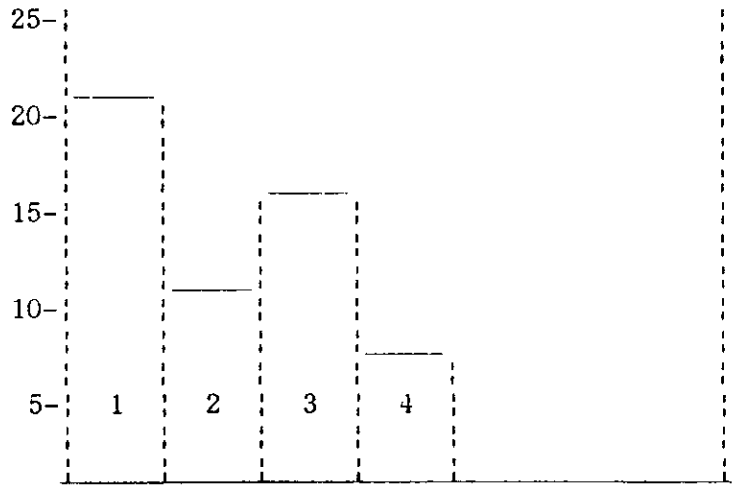
If the library media specialist wants to project ahead, a second map might be prepared to match the unit titles in the new curriculum guide or textbook. It would not, however, have the benefit of quality ratings. If the new curricular demands were as unsuccessful as the old, then major collection change is recommended.

Alternative Map #5: Mapping a type of AV media

If the library media specialist is trying to build commitment to a particular technology and its software, then a map of the software could be drawn. Both quality and quantity could be charted similar to previous maps. Examine the following map (Sam.alt.map.5 on Side One of the template disks):

COMPUTER SOFTWARE
BY CURRICULAR AREA

1. Mathematics
2. Music
3. Language Arts
4. Science



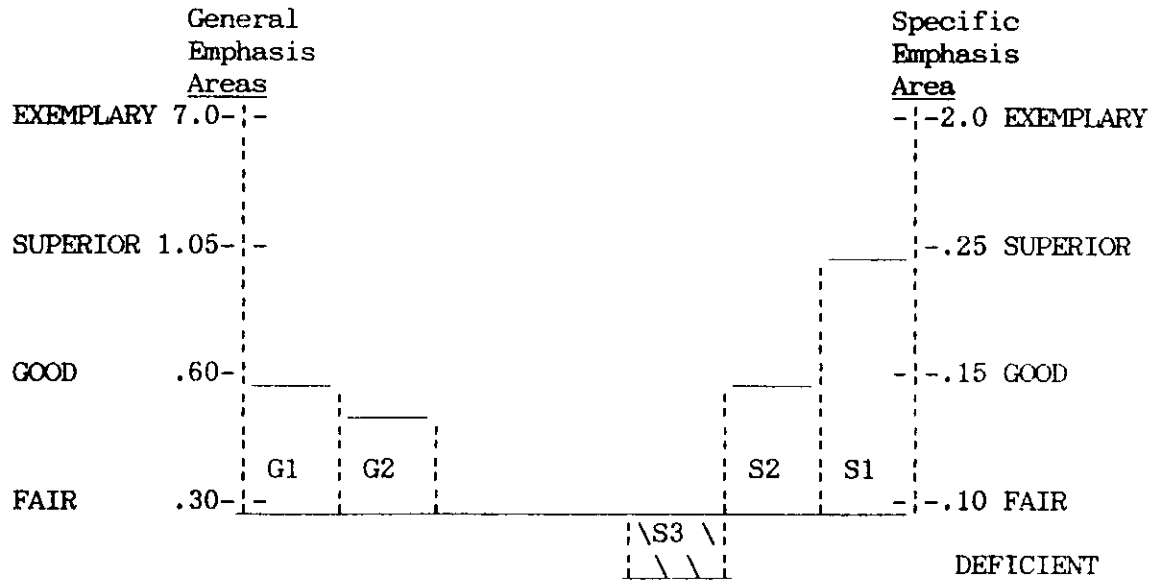
Charted as number of programs available

Interpretation: Math software predominates but there are a number of curricular areas that are not represented at all. Target purchases could be made for areas such as foreign language, home economics, auto mechanics and business. The map does not indicate strength by types of software such as tutorials, simulations or drill and practice. Charts illustrating these materials might be constructed.

Alternative Map #6: Draw a positive/negative collection map

Certain collection segments go below what the library media specialist judges as adequate size. To graph these collections, a certain size (fair on the example) would be considered as the axis of the graph and collections segments below that size would be graphed negatively (**Sam.alt.map.6 on Side One of the template disks**).

Emphasis Area Name	# of Items	Items/Student
G1. Folklore & fairytales	305	.51
G2. Animals	263	.44
S1. Indians of North America	150	.25
S2. Frontier & pioneer life	79	.13
S3. Dinosaurs	53	.09



Interpretation: While emphasis collections G1,G2,S1 and S2 are in the good to superior range, collection S3 is deficient, i.e., it comes nowhere near meeting the demands of the curriculum for that topic. A collection target would be created to improve all the "deficient" collections.

Alternative Map #7: Use computer graphing packages

"MegaWorks" and "GraphWorks" are two separate programs which are designed to be used with AppleWorks to graph data. There are many other graphing programs available for the Apple computer. If the scale divisions are acceptable, then these packages will be useful. If you have a color printer, colored graphs can be produced on the computer rather than coloring them by hand.

Chapter 4: Mapping the Collection in Depth

Chapter 4

Phase Two

MAPPING THE COLLECTION IN DEPTH

In Phase One, the collection was mapped to provide a picture of the strengths of the current collection. In Phase Two, an analysis of what strengths the collection should have will be done. Briefly, during the second phase, the library media specialist will:

1. Build a curricular topics master list.

2. Rank the curriculum topics list by having teachers and administrators help decide which emphasis areas the collection should have.

3. Re-check the current collection. You may have more materials than you thought you had on some topics.

4. Decide the fate of the emphasis collections. Have teachers and administrators help decide what should happen to the current emphasis areas of the collection.

5. Re-map the collection to show collection targets for the future.

6. Create a realistic budget in consultation with teachers and administrators to accomplish the collection goals.

Step 1

Build a Curricular Topics Master List

Useful templates on Side Two of the template disks:

Emphasis.areas - A file containing a list of all the emphasis collections declared by the participating schools in the Ho-Loertscher research.

Pot.emph.coll - A potential emphasis area collection spreadsheet (used as a database) useful in compiling a list of every topic studied in the school and its accompanying emphasis area title.

Units.titles and **Cur.guide.topic** - Two spreadsheet examples, the first contains textbook chapter titles and the second includes curriculum guide topics.

If collections are to be matched to the curriculum of the school, the library media specialist must be knowledgeable of what is being taught in the school and be tuned in to the cycle of curriculum change. An entire study of curriculum complete with the tools to accomplish it is recommended here. If that is not feasible, then a shortened study may be done.

In a typical school, hundreds of instructional units might be taught. All of these units deserve to be supported in an exemplary way by library media collections. For a variety of reasons, that support may be lacking. However, the library media specialist must know what is being taught, by whom, when, and how often -- both at the present time and in the future. There are four basic sources to use in identifying what is taught in a school.

a. Textbooks.
b. Curriculum guides.
c. What teachers actually teach.
d. Proposed curricular change (documents, adopted texts).

Anyone with experience in schools may recognize that the four sources listed above may be quite different. The library media specialist should probe the source or combination of sources which will give the truest picture of what is actually being taught and what will be taught in the near future.

Load the Units.titles and Cur.guide.topic spreadsheets from the template disk. These templates provide a brief curriculum topics lists for practice. The data entered include course name, unit title, grade, month normally taught and rank (used later in Step Two). Practice adding sample topics to either or both of the spreadsheets but do not add the priority rating. Then practice arranging the spreadsheets in various ways. For example, arrange either file by grade level, then by course name and finally by unit title.

****

AppleWorks tip: To arrange entries in a column, move the cursor to the correct column and then use Open-Apple A. To arrange multiple columns, start with the least interesting column first and then back up to the most important column. In our example, first arrange the unit title column, then the course name column, and finally the grade level column. Warning: Don't put your cursor on the column label when you arrange or AppleWorks will alphabetize the column label. Instead, put your cursor on the cell just below the column label - then arrange.

****

What value is the spreadsheet when it is arranged as instructed above?

Try a number of other arrangements. What uses might they have? Some suggestions are:

a. Arrange by month taught and sub-arrange by course name. (Arrange course name column first, then the month taught.)

b. Arrange by course name and sub-arrange by month taught.

c. Arrange by rank and sub-arrange by course title. (useful in Step Two)

When you feel comfortable using the Units.titles and the Cur.guide.topic files, use the Pot.emph.coll template to do an actual study. Modify any of the columns if desired before beginning.

One file on the template disk might be helpful in making decisions. Emphasis.areas contains a list of all the emphasis collections which were identified by the schools in the Ho-Loertscher research. Examining this list will give a clearer picture of the diversity and strengths of school library media collections in various parts of the country.

If a complete curricular study is not feasible because of time or staff constraints, then the study may be abbreviated by listing a few units from each area of the curriculum which would be prime candidates for emphasis collections. Teachers and/or department heads would be helpful in compiling this abbreviated list.

Step 2

Rank the Curriculum Topics List

Useful templates on Side Two of the template disks:

Pot.emph.coll - A potential emphasis area collection spreadsheet (used as a database) useful in compiling a list of every topic studied in the school and its accompanying emphasis area title.

Units.titles and Cur.guide.topic - Two spreadsheet examples, the first contains textbook chapter titles and the second includes curriculum guide topics.

The second step is to ask: "Which of all the curricular units taught in the school should have emphasis collections built?" The answer to this question is one of the most momentous decisions a library media specialist can make. A great deal of money can be spent on emphasis collections. If those collections are not used, then the money is wasted, no matter how good the materials in the collection are or how carefully they have been selected.

It is undesirable for the library media specialist to decide which emphasis areas of the collection to build without the help of teachers and administrators. When teachers don't participate consciously in

building collections, they have no stake in what materials are purchased. They usually have little inclination to use what someone else thought they might need.

The library media specialist should meet with departments, grade level teams, textbook selection committees or other groups and allow these people to help prioritize what emphasis collections should be built. Some decision criteria might be:

a. How often will this topic be taught in this school during the next five years?

b. Does this topic lend itself to the use of a wide variety of library media materials?

c. How many students will be studying this topic?

d. Do we already have an emphasis collection in this topical area?

e. What teachers are still likely to be teaching at this school for the next five years if we decide to build this emphasis collection?

f. Do we anticipate curricular change in this topical area in the next five years?

g. Do other schools, regional media centers or other libraries already have an emphasis collection in this topical area? If so, do we really need to build it or could we borrow?

Record the agreed upon rankings in the spreadsheet entitled Pot.emph.coll. But first, you may wish to practice using the Sample School.

Working with the Sample School

Objective: To prioritize all the proposed emphasis collection titles in preparation to make final decisions about what emphasis collections to build.

1. Load the templates entitled Units.titles and Cur.guide.topic.

2. Add a priority ranking to each of the units listed. Use the following scale:

   5 = essential
   4 = strong need
   3 = average need
   2 = below average need
   1 = long shot

AppleWorks tip: You need not press Return after every entry. Arrows work just as well - just enter the number and then press the appropriate arrow to the next cell.

3. Practice arranging the spreadsheets in priority order and print out practice copies for use by teachers and administrators.

For an actual school, load the template entitled Pot. emph.coll. Assign a priority ranking 1-5 to each of the curricular topics listed in the template. Use the scale as defined above. Be sure that administrators review the priorities to help make the decisions. They will be asked to help fund collection growth, so they need to help decide what topics will be supported!

Print out the local list of curricular topics in priority order. Star those that are finally ranked as essential. These collections will be built for the next year or several years.

Step 3

Re-check the Current Collection

Useful templates on Side Two of the template disks:

Collect.chart - A giant spreadsheet containing three sub-sections. The "PROPOSED PURCHASE CHART" section will be used to record what emphasis collections a school wishes to build.

Sam.col.chart - A sample spreadsheet to be used for practice.

Sam.col.chart.2 - A completed spreadsheet showing the "PROPOSED PURCHASE CHART."

Since every library media center collection will already contain some materials on virtually every topic of the curriculum, the library media specialist must map each of the proposed emphasis collections to see how much material is already owned. The **Collect.chart** spreadsheet should be used for this analysis.

You may wish to try the Sample School first.

Working with the Sample School

Objective: To discover the size of the present collection in each of the proposed emphasis areas.

1. Load the template entitled **Sam.col.chart** (the one you used in Phase One - it should now be on Side Two).

2. Move the cursor to the center section of this three-part spreadsheet. The section is titled "PROPOSED PURCHASE CHART." Become familiar with this section of the chart.

3. First, you will want to copy all the current emphasis collection titles to this spreadsheet from the "CURRENT COLLECTION CHART" part of the spreadsheet on the far left. AppleWorks will not automatically copy labels from one part of the spreadsheet to another, so you will have to do this manually. The authors recommend that you copy a block of information rather than just retype it. You will make less errors and the appropriate cells will stay in the same order. To copy the block of emphasis titles from the left spreadsheet to the center one:

   a. Move the cursor to cell A29.

   b. Press Open Apple C. Light up "Within worksheet." Use the arrows to light up cells A29 and A30. Press Return.

   c. Move the cursor to cell F29 using the arrows. Press Return. The names of the general emphasis titles should now be present in cells F29 and F30 of the spreadsheet. The titles will probably be cut off (truncated) in the new spreadsheet because there are many more columns needed for data. As long as you know what each emphasis collection is, you need not worry.

   d. Now use the same method to copy Cell A40, A41 and A42 to Cell F40,F41 and F42.

   e. Type in the three new emphasis areas as follows:
      Cell F43 = S4. Culture
      Cell F44 = S5. China
      Cell F45 = S6. Japan
      Cell H43 = 24 - the items you already own...
      Cell H44 = 8
      Cell H45 = 13

   f. Save the spreadsheet. It should look like **Sam.col.chart.2**" on the template disk.

For an actual school, load Collect.chart and work in the PROPOSED PURCHASE CHART section.

1. Copy the emphasis collections from the CURRENT COLLECTION CHART into the PROPOSED PURCHASE CHART.

2. Type in any new emphasis collections you would like to build.

3. Survey your current collection for the new topics and enter the data in the "# of Items" column.

Step 4

Decide the Fate of the Emphasis Collections

Useful templates on Side Two of the template disks:

Collect.chart - A giant spreadsheet containing three sub-sections. The "PROPOSED PURCHASE CHART" section will be used to record what emphasis collections a school wishes to build.

Sam.col.chart - A sample spreadsheet to be used for practice.

Sam.col.chart.2 - A completed spreadsheet with first two sections filled in for the Sample School.

Sam.col.chart.b - A completed spreadsheet used for alternative mapping technique #1 for the Sample School.

Step 4 can be done simultaneously with Step 3. Since the current collection already contains some emphasis collections, teachers and administrators should help decide what should happen to these collections over the next few years.

Three decisions can be made about an emphasis collection.

a. Build it -- Major amounts of money will need to be budgeted and it will need to be weeded regularly.

b. Maintain it -- The collection will need to be weeded regularly and money budgeted to replace valuable materials and purchase the best of the newest materials published in that area.

c. De-emphasize it (let it die) -- No money will be spent on the collection and it will be weeded regularly.

Before working with an actual school, you may wish to work with the Sample School.

Working with the Sample School

Objective: To enter the goal and how many items will be purchased for each emphasis area in the spreadsheet.

1. The file **Sam.col.chart** should be on your desktop. Make it visible.

2. Enter the following:

Cell N29 = D	Cell P29 = 0
Cell N30 = M	Cell P30 = 10
Cell N40 = M	Cell P40 = 10
Cell N41 = B	Cell P41 = 50
Cell N42 = M	Cell P42 = 10
Cell N43 = B	Cell P43 = 40
Cell N44 = B	Cell P44 = 30
Cell N45 = B	Cell P45 = 30

   Your spreadsheet should look like **Sam.col.chart.2**" on the **template disk.**

3. Save the spreadsheet on Side Two and Side Three of the template disks.

For an actual school, load **Collect.chart** from the template disk. The central section, "PROPOSED PURCHASE CHART" has a column to enter the decision for each of the emphasis collections: B (build), M (maintain) or D (de-emphasize). Then enter the number of items for proposed purchase for each emphasis collection based on the status decision. The file **Sam.col.chart.2** is an example of these decisions which may be examined. Save the spreadsheet on Side Two and Side Three of the template disks.

If you have chosen to use the alternative mapping technique #1 "Charted as items/# students who use the topic," examine **Sam.col.chart.b** on the template disk.

Step 5

Re-map the Collection

Useful templates on Side Two of the template disks:

Collect.chart - A giant spreadsheet containing three sub-sections. The "PROPOSED PURCHASE CHART" section will be used to record what emphasis collections a school wishes to build.

Propose.map - A skeleton map ready for drawing bars for emphasis collections.

Sam.Propose.map - The collection map for the Sample School.

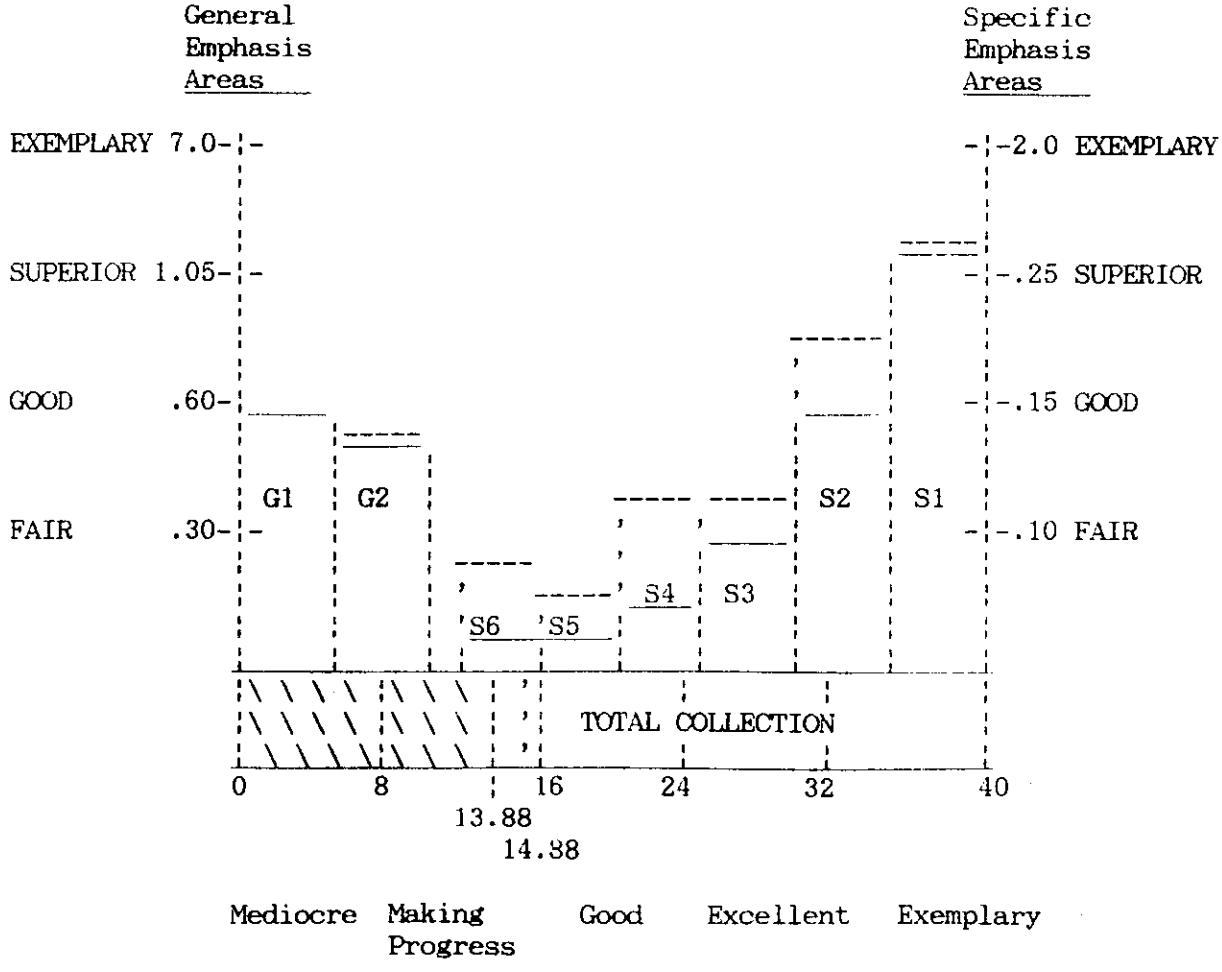
Since the collection map done in Phase One shows the current strengths of the collection, a second collection map -- as large and colorful as the first should be drawn. This second map will show the collection targets of the future. Thus, when people tour the library media center and stop to look at the collection map, they will instantly be able to see where the collection now stands and where it needs to go (any donations to the cause are instantly accepted). The second collection map will be titled "Proposed Collection Map."

Using the data from the "PROPOSED PURCHASE CHART" section of the **Collect.chart** spreadsheet built in Step 4, draw the proposed collection map. Current strengths will be drawn with solid lines. Proposed additions will be drawn with dotted lines. Another possibility would be to draw the bars in solid lines and use solid color to represent the current collection size. The result might look like the Sample School drawn in **Sam.propose.map**:

SAMPLE ELEMENTARY SCHOOL
PROPOSED COLLECTION MAP

Date: Sept. 10, 1986
School Name: Washington
No. of Students: 597
Total Collection Size (Items/Student): 8,289 (13.88)
Proposed Total Collection Size (Proposed Items/Student): 8,866 (14.88)

Emphasis Area Name	# of Items Owned*	Proposed # of Items**	Decision
G1. Folklore & fairytales	305 (.51)	305 (.51)	De-emphasize
G2. Animals	263 (.44)	273 (.46)	Maintain
S1. Indians of North America	150 (.25)	160 (.27)	Maintain
S2. Frontier & pioneer life	79 (.13)	129 (.22)	Build
S3. Dinosaurs	53 (.09)	63 (.11)	Maintain
S4. Culture	24 (.04)	64 (.11)	Build
S5. China	8 (.01)	38 (.06)	Build
S6. Japan	13 (.02)	43 (.07)	Build



Note: * Figures in parentheses indicate # of items owned/student.
** Figures in parentheses indicate proposed # of items/student.

For an actual school, load the **Propose.map** template from the template disk. Either type in the top of the chart or copy the data via the clipboard from Collect.chart. Print the file out and draw the bars.

Step 6

Create a Realistic Budget

Useful templates from Side Two of the template disks:

Budget - A template created for a traditional line item budget with columns for expenditures for books, audiovisual materials, equipment and supplies.

Sample.budget - A sample traditional budget for the Sample School.

Emphasis.budget - A template created to budget for each emphasis collection plus columns for basic, outstanding and annual purchases.

Sample.emph.bud - A sample emphasis collection budget for the Sample School.

As an integral part of decisions made in steps 2, 3 and 4, teachers and administrators should help decide which emphasis areas of the library media collection should be built not only in terms of need but also in relation to the amount of money that will be needed to build the proposed collection.

Decisions to build a collection might entail discussion on the following points:

1. What emphasis collections can be built with regular district funds?

2. What federal monies can be used to build emphasis collections?

3. What grants and gifts can be sought to build emphasis collections?

A healthy competition for funding might be encouraged among departments with heavy users getting priority and potential users encouraged.

Two budget spreadsheets are recommended here. The first is a traditional budget which keeps track of expenditures based on normal school district accounts for books and audiovisual media. The second tracks expenditures totally by emphasis collection. Since both are easy to keep, both ways of tracking expenditures are recommended.

The Traditional Budget

Load **Budget** and **Sample.budget** from the template disk. Study the **Sample.budget** template. Notice that the income for the library media center is recorded at the top of the spreadsheet in rows 4 - 8. Sources and amounts are listed. The remainder of the spreadsheet tracks expenditures each month and keeps running totals.

Practice entering purchase order amounts in **Sample.budget** for the month of October. The template **Budget** may be used for an actual school and can be modified to meet local conditions. Be careful when modifying the spreadsheet that the formulas are correct. After the adjustment, save the **Budget** file on Side Two and Side Three of the template disks.

Practice printing out reports by month and by year for administrators. Even better, mail part of the **Sample.budget** spreadsheet to a word processed file as part of a budget report.

****

AppleWorks tip: Printing out spreadsheets is a perennial problem. Invariably they are wider than the printer will allow. There are several solutions. Try any of them.

1. Press Open Apple O and change the characters per inch to 17. This will give you the number of characters for an eight inch paper. If you have the wide carriage printer, you can put in wide paper and adjust the platten width while in Open Apple O.

2. If the characters per inch solution doesn't work, then you can print out blocks of information. Press Open Apple P and select block. Light up the part of the spreadsheet that will print out on your width of paper and press Return. You can print out several blocks of the spreadsheet and then paste them together.

3. If you don't like any of the results above, there are a number of programs available on the market which will print the spreadsheet vertically on the paper rather than horizontally. We have been successful with "FontWorks," and "Sideways" is a popular program. There are also a number of public domain programs which will do the same thing. Check with an Apple computer buff.

****

The Emphasis Budget

The second method of tracking expenditures allows the library media specialist to track expenditures by emphasis area. Load **Emphasis.budget** and **Sample.emph.bud** from the template disk. Examine the **Sample.emph.bud** carefully. Notice that in rows 14 and 15, each emphasis area of the collection has been named and an allocation has been made. Then each

month, expenditures are distributed among the emphasis collections and amounts remaining in each "emphasis account" are calculated.

Notice that three categories have been added to the **Sample.emph.bud** template which were not defined as emphasis areas. These are: BASIC, OUTSTANDING, AND ANNUAL. These categories would take care of normal expenditures for items not a part of the emphasis collections. A few definitions might be helpful.

BASIC purchases - This part of the collection contains diverse materials that will help build the breadth of the collection. Good materials in all curricular areas which are reviewed or previewed and recommended for purchase come from these funds.

OUTSTANDING purchases - An amount needs to be budgeted for the best of the best published each year. Award winners, irresistible titles from the best authors and sure bets with readers or teachers are included in this budget.

ANNUAL purchases - Some materials are purchased year after year. Examples include almanacs, periodicals such as "School Library Journal" and reference books. An amount should be budgeted for these materials each year.

Now practice entering monthly expenditures for October. **Emphasis.budget** can be used for an actual school. Enter areas and budgeted amounts in rows 14 and 15. Save **Emphasis.budget** on Side Two and Side Three of the template disks after you've entered the data.

Print out budget reports which track expenditures by emphasis collections.

****

AppleWorks tip: Learn to window the spreadsheet so that the budget labels stay visible at the top of the spreadsheet while entering data in the various months. If you have never done it, try the following:

1. Load **Sample.emph.bud**.
2. Now move the cursor to cell A17.
3. Press Open Apple W.
4. Light up "Top and bottom" and press Return. (Or just press T.)
5. Press Open Apple W.
6. Light up "Syncronized" and press Return. (Or just press S.)

The cursor may now be moved anywhere in the spreadsheet but the labels will remain at the top. To get back to the normal spreadsheet, press Open Apple W , light up "One" and press Return. (Or press O.)

****

Chapter 5: The Computerized Acquisition System

Chapter 5

Phase Three

THE COMPUTERIZED ACQUISITION SYSTEM

In Phase One, the collection was mapped to provide a picture of the strengths of the current collection. In Phase Two, an analysis of what strengths the collection should have was done and a proposed collection map was created.

Since the proposed collection map now contain both present and proposed emphasis areas, an acquisition system needs to be built which matches the map. The acquisition system suggested here will utilize "AppleWorks" to assist in the building of consideration files, purchase orders, and received files.

Briefly, during the third phase, the library media specialist will:

1. Analyze the types of the materials to purchase for each emphasis collection. For example: for the Civil War unit, look for original source materials, materials for special learners, pictorial sources, and "range of opinion" materials to add to the present collection.

2. Prepare a spreadsheet to match the emphasis areas and basic collection segments.

3. Select materials from reviews, bibliographies, previews, etc.

4. Create an acquisition file which will also serve as the on-order file and the received file.

5. Use the power of the database to make purchase decisions. Then create purchase orders from the acquisition file.

6. Record received items in the computer file and decide the disposition of items not received.

7. Enter revised budgetary information in the spreadsheet.

8. Create new material announcements from the computerized file.

9. Create a new collection map. This map becomes next year's current map.

Step 1

Analyze the Types of Materials to be Purchased for Collections

Useful templates on Side Three of the template disks:

Types.of.mats - A word processed file which contains suggestions from various curricular areas of the types of materials which might be purchased for an emphasis collection.

Samp.mats.list - A word processed file which contains the decisions made by teachers and library media specialists for building emphasis collections in the Sample School.

Given an emphasis collection title such as Civil War, no library media center can hope to have all materials ever written or produced on that topic. Thus, the library media specialist and the teachers must choose carefully from all that has been published to match curricular needs.

Teachers often have an accurate conception of what types of materials they need for the activities of a certain unit of instruction. They do not, however, have a thorough knowledge of what has been published or produced in that area. The expertise of a library media specialist is required. That person knows how to get bibliographies, review sources, publisher lists and preview materials to assist in the tough task of selecting "the best" for a given purpose.

To meet the curricular demands made upon an emphasis collection, certain types of materials are more useful than others. For example, a short factual history of the Second World War may be much more useful to a student than Churchill's history of that War. A student doing a report on Lincoln may not get much help from Gore Vidal's Lincoln.

Teachers can be of great assistance to the library media specialist by suggesting types rather than specific titles for purchase. For example, in analyzing an elementary school unit on birds, the teacher might say: We need some pictures of birds for bulletin boards and for individual student reports. Bird identification books, a good filmstrip to be used in testing bird identification, a computer simulation covering human displacement of bird sanctuaries, books showing how to set up bird feeding stations in the city -- all might be needed for a particular collection to support the unit on birds properly.

While a definitive list of types of materials cannot be presented here, the following suggestive list is indicative of what might be proposed by a teacher and library media specialist planning together concerning "what we should buy."

Civil War (High School)

Original source materials
Opinion spectrum materials
Campaign and battle maps
Reference books
General overview histories
Biographies of generals (find easy-reading ones)
Slide sets of Matthew Brady photos

Japan (Elementary School)

Look for a kit containing realia
Filmstrips covering high technology
Filmstrips/videos/slide sets on geography
How-to books on Japanese writing
Books with many culture-related pictures
Factual sources
Japanese folklore

The above list is something like a subject heading list. It will be very useful when constructing reading reviews and in constructing a consideration file as a database. Examine the template **Types.of.mats** very carefully. You may wish to practice creating such a list before meeting with teachers or department heads to make these types of decisions.

Building Emphasis Collections

As a part of curricular planning with teachers, decide what materials should be purchased for each emphasis collection. Keep this list handy. You may wish to work with the Sample School at this point.

Working with the Sample School

Objective: Plan with teachers the types of materials to be purchased for the emphasis collections "Culture," "China," and "Japan."

1. Load the template **Samp.mats.list** from the template disks.

2. Examine the types of materials planned for purchase. You may wish to add some types of materials to each emphasis collection.

Building Basic Collections

The basic collection may contain many subject areas which have not been declared emphasis topics. Nevertheless, these general topics need

some attention. The basic collection serves diverse needs, so it requires a little bit of everything -- the best of what is published in topics taught in the school and some which aren't. Like the types of materials lists made above, the library media specialist might keep a running list of types of materials to purchase for the general collection. Suggestions are encouraged from teachers and students. The list might look something like this:

Basic Collection Needs

Horse stories
Duplicate copies of last year's Caldecott winner
Insect identification books
More picture disks for "The Print Shop"
How-to book on clay molding

Reviewing this list before reading the monthly crop of reviews will help jog the mind when a good title is mentioned.

Three parts of the basic collection should be built as part of the acquisition system:

a. Basic - Good materials for all curricular areas, student and teacher interests - the best of the current crop which will provide diversity and breadth to the collection.

b. Outstanding - Any materials which are "must" purchases because of their quality. They might be award winners or new titles by "must have" authors.

c. Annual Purchases - Any materials which are purchased regularly. Examples are: an almanac, a yearbook, a selection tool or a general periodical title.

Summary

As a summary for Step 1, and as a prelude to the actual selection process, the library media specialist will build a repertoire of needed materials in each of the following areas:

a. Each emphasis collection (the types of materials to purchase will be listed).

b. Basic materials chosen to provide breadth to the collection.

c. Outstanding materials chosen for the base collection.

d. Annual purchases needed to provide continuity to the collection.

Step 2

Prepare a Spreadsheet

A spreadsheet entitled **Emphasis.budget** and its accompanying **Sample.emph.bud** on Side Two of the template disks were built in Step 6 of Chapter 4. Check this file to see that it contains:

a. Columns for all emphasis collections.

b. Columns for BASIC, OUTSTANDING, and ANNUAL.

c. Budgeted amounts for each column.

Step 3

Select Materials

Useful templates on Side Three of the template disks:

Types.of.mats - A word processed file which contains suggestions from various curricular areas of the types of materials which might be purchased for an emphasis collection.

Samp.mats.list - A word processed file which contains the decisions made by teachers and library media specialists for building emphasis collections in the Sample School.

As library media specialists read reviews, search bibliographies and preview materials, they will use the types of materials lists to assist them in making selections for the consideration file which will be put on the computer.

There are three categories on the computerized acquisition file which will need information noted in the selection process. These categories are:

a. Emphasis Area - Which emphasis area the item belongs to. If no emphasis area, then BASIC is entered.

b. Topic or Type - Here will be entered the type of material such as "original source" if the material is for an emphasis collection. If for the BASIC collection, then a topic (Sears-type subject heading) will be entered (Birds, Civil War, science fiction, etc.)

c. Priority - How important this item is for purchase - rated on a scale of 1-5. 5 = essential purchase and 1 = purchase if funds are plentiful.

As each review is read, write the three pieces of information in the margin near the review. This information will be needed by the person entering the item in the computerized consideration file. For brevity, codes or shorthand could be used.

Examples:

An Encyclopedia of Dinosaurs
Emphasis Area: Dinosaurs
Topic or Type: Identification sources
Priority: 5
(Din,ID,5)

Mystery of the Creeking Stair
Emphasis Area: Basic
Topic or Type: Mystery
Priority: 3
(B,Mystery,3)

The Polar Express
Emphasis Area: Outstanding
Topic or Type: Award winner
Priority: 5
(Out,AW,5)

World Almanac
Emphasis Area: Annual
Topic or type: Reference
Priority: 4
(An,ref,4)

Since a clerk should enter the materials into the computerized consideration database, whatever shorthand system is selected should be common knowledge between the library media specialist and the clerk.

Some practice for the Sample School might help fix the habit of writing the three items on each review.

Working with the Sample School

Objective: To rate each review item, bibliography entry or item previewed on the three criteria for selection: Emphasis Area, Topic or Type, and Priority.

1. Obtain a sample issue of either "Booklist" or "School Library Journal."

2. Review the proposed collection map of the Sample School in Chapter 4 and the **Samp.mats.list** file from the template disks.

3. Beside each item selected, write in code or complete words, the Emphasis Area, Topic or Type, and Priority. See Appendix 5 for an example.

4. Practice until the process becomes second nature.

For an actual school, assemble a collection of regular review sources, bibliographies and preview items. Record in code or complete words the Emphasis Area, Topic or Type, and Priority in the margin or near each item selected for the computerized consideration file.

Step 4

Create a Computerized Acquisition File

Useful templates from Side Three of the template disks:

Consid.acq.file - The blank template used by an actual school to enter materials for purchase consideration.

Samp.acq.file.1 - The Sample School consideration file used for practice entering of items from reviews.

Most library media specialists have some sort of consideration file kept on cards, slips of paper or in a notebook. At purchase time, these hand-kept files must be ranked, decisions made, and purchase orders typed. The authors propose that the entire consideration file be computerized.

Load **Consid.acq.file** from Side Three of the template disks. The following categories appear:

Author -- Author's name, last name first.
Title -- Title of material (no articles, please).
Publisher -- Publisher's name (short form ok).
Year -- Date of publication.
ISBN# -- This category is optional but some jobbers and automated order systems require it.
Copies -- The number of copies you need.
Review source -- This category is optional. If used, use standard abbreviations to keep the information short.
Type of Media -- Book, filmstrip, record, etc. (abbreviations would be great).
Emphasis area -- Enter here the name of the emphasis collection which you proposed to build. If the item is not part of an emphasis collection, enter BASIC in this category.
Topic or Type -- Enter the type of material such as "original source" if the material is for an emphasis collection. If for the BASIC collection, then a Sears-type topic (subject heading) will be entered (Birds, Civil war, science fiction, etc.).
Priority -- Rank how important this item is for purchase - rated on a scale of 1-5. 5 = essential purchase and 1 = purchase if funds are plentiful.
Requested by -- Enter the name of a teacher or student here if you wish to track this information.
On order date -- In Step 5, you will enter here the date that a purchase order is created for the item.
Received -- In Step 6, you will enter here either a "yes" or a call number.

Before using Consid.acq.file for an actual school, perhaps some practice with the Sample School will help.

Working with the Sample School

Objective: To practice entering items from review sources into the computerized acquisition file.

1. Load Samp.acq.file.1 from Side Three of the template disks.

2. Using the practice review journal pages in Step 3, enter the selected items into the database. Leave the "On order date" and "Received" categories blank. Before you actually enter the item, you need to find out if it is already in your file (you may own the item, it might already be on the file for consideration, or it might be on order). Use Open Apple F to find any unique word in the tile or author's name. If it is found, you need not enter it again. If not, then add it to the file.

3. When you are comfortable doing data entry and could teach a clerk to do it, stop.

In an actual school, load **Consid.acq.file** and enter items from reviews and bibliographies into the database leaving "One order date" and "Received" categories blank. Before you enter each title, use Open Apple F to see if it is already in the database (this is a big payoff in time!!!). If not, add the item to the file. Save your work.

Step 5, Part 1

Use the Power of the Database to Make Purchase Decisions

Useful templates on Side Three of the template disks:

Consid.acq.file - The consideration database file with materials entered for purchase decisions.

Samp.acq.file.1 - The Sample School consideration file for practicing the Boolean searching.

Having a computerized consideration database in operation, the library media specialist may now make decisions concerning which materials to actually purchase. The power of the computerized consideration database should now be used to its fullest potential to assist in the decisionmaking process.

One of the best ways to use the consideration database is to make purchase decisions emphasis area by emphasis area. From the budget spreadsheet, the amount of money available for each emphasis collection is listed. A sample purchase decision might go as follows:

1. Assume there is $350 to spend on building the China emphasis collection.

2. The database is searched to find all materials being considered for this collection ranked in priority purchase order. This part of the database can be printed out for perusal or just examined on the screen.

3. Any item that is selected for purchase will have an order date typed into the field "On order." Those items not selected will be left with a blank "On order" field.

4. After purchase decisions are made, the entire **Consid.acq.file** is arranged by "On order" category.

After all the purchase decisions are made for each of the proposed emphasis collections, then decisions need to be made concerning the basic collection. All items in the database which belong to the BASIC collection will be arranged in topical order. Decisions to purchase can then be made topic by topic considering the rankings given each item.

Before purchase decisions are made for an actual school, practice in the Sample School may help.

Working with the Sample School

Objective: To make purchase decisions using the arranging and the Boolean search power of the database.

1. Load **Samp.acq.file.1** from Side Three of the template disks.

2. You will be making purchase decisions for three emphasis collection areas: China, Japan and Culture. Three emphasis collections can be done at one time.

3. Press Open Apple R. Move the cursor to "Emphasis area" and press Return. "Equals" is lighted. Press Return and type "China." "And, or and through" now appear on the screen. Light up "or" and press Return. Light up "Emphasis area" and press Return. "Equals" is lighted . Press Return and type "Japan" and press Return. Light up "or" and press Return. Light up "Emphasis area" and press Return. "Equals" is lighted. Press Return and type "Culture" and press Return.

4. Twelve items should now be on the screen. We are now going to arrange by priority within each of the emphasis areas. In single record format, move the cursor to Priority and press Open Apple A. Arrange from 9-0. Move the cursor to Emphasis Area and press Open Apple A. Arrange from A-Z.

5. We now need to calculate how much money all the materials would cost within each of the emphasis areas. To do this, first take a deep breath - here we go!

   a. Create a new "tables" format. To do this, press Open Apple P. Light up "Create a tables format" and press Return.

   b. Eliminate unnecessary categories: Publisher, Year, ISBN#, Review Source, Type of media, Topic or Type, Request By, On Order Date, Received. To do this, use the Right or Left Arrow to move the cursor to the category you wish to delete and press Open Apple D.

c. Adjust any column widths you wish. To do this, use the Right or Left Arrow to move the cursor to the intended category. Press Open Apple Right or Left Arrow to increase or decrease the column width.

d. Insert a Calculated Category as the right-most column. To do this, move the cursor using the Right Arrow to the Len column. Press Open Apple K. A new Calculated column will appear. At the bottom of the screen, we can rename this column. Press Open Apple Y and name it Total. You are asked to type the calculation rules. You want to multiply columns Copies by Cost. Use the example to type in the formula (example: C*D). It asks for the number of decimal places - make it 2. Accept the 3 blank spaces (press Return).

e. Create a grand total for the "Total" column. To do this, while your cursor is on the column "Total," press Open Apple T. Follow the screen instructions.

f. Create sub-totals for each emphasis collection. To do this, move the cursor to the Emphasis Area column. Press Open Apple G. Follow the screen instructions.

g. Print out the file. To do this, press Open Apple P and follow the screen instructions.

h. Take a lunch break or reward yourself with a big piece of lemon pie! If you do, save your work first.

6. You are ready now to decide what you will actually buy! You have a print-out in front of you which is very valuable. It arranges each emphasis collection in priority order and gives the prices and dollar totals. Mark those items you wish to purchase. Change the number of copies if you wish.

7. Now actually record in the database what you will order. You should have the twelve titles for China, Japan and Culture on the screen. Suppose you have decided to buy only the priority "5" items. Put the cursor on the top record and press Open Apple Z. For each item you wish to purchase, type "Apr 86" in the On Order Date category.

8. Press Open Apple R. Select all records and save your work! Your file now should look like the **Sam.acq.file.2** on the template disk. Items you would like to purchase should have the on-order date filled in.

In an actual school, load Consid.acq.file, then:

1. Do Boolean Searching to isolate all the emphasis or basic parts of the collection you wish to order from.

2. Arrange the retrieved records by priority within the emphasis or basic collections.

3. Create a new "tables" format to include the following categories: author, title, copies, cost, emphasis area and priority. Create a calculated column which will calculate the grand total. Create sub totals within each emphasis area.

4. Print out the file.

5. Use the hard copy to decide what you will actually purchase.

6. Now enter the on-order date in the database for each item to be purchased and save your work. If you are an expert with AppleWorks, you can use the ditto command to avoid having to enter the order date over and over. Good luck.

Step 5, Part 2

Create Purchase Orders

Useful templates from Side Three of the template disks:

Consid.acq.file - The blank template used by an actual school to enter materials for purchase consideration.

On.order.temp - A temporary file used to store only items for a current purchase order.

Samp.acq.file.2 - The Sample School consideration file including purchase decisions for an order dated Apr 86.

Sample.PO - A copy of only those materials from the **Samp.acq.file.2** which are ready to print out for a purchase order.

Your entire database now has items you wish to purchase with an on-order data entered. You are ready to isolate only those items for purchase, transfer them to a temporary on-order and then print out the purchase order list (or forms). Before you do this, you may wish to work with the Sample School.

Working with the Sample School

Objective: To create a purchase order.

1. Load **Sample.PO, On.order.temp and Samp.acq.file.2** from the template disk.

2. **Samp.acq.file.2** should be now on your screen. Press Open Apple R. Move the cursor to "On order date" and press Return. "Equals" is lighted. Press Return and type "apr 86." Press Escape to discontinue the search.

3. On the screen, the items you would like to purchase should appear. You are going to copy but not move the items to **On.order.temp**. To do this, move your cursor to the first item. Press Open Apple C, select "To clipboard (cut)," and press Return. Press Open Apple 9 to light up all the records, then press Return.

4. You will now get the copies from the clipboard and put them in your on order file. To do this, press Open Apple Q to retrieve On.order.temp to your screen. Press Open Apple C again, select "From clipboard (paste)" and press Return. Now the items you would like to purchase should be copied from the clipboard to the on order file. Delete the record with instructions in it.

5. Print out the table format order list with totals and sub-totals calculated as you've tried in Step 5, Part 1. You will use this information in Step 6 to check in your materials. Your result should look something like a printed version of **Sample.PO** using the "April.order" format which was already saved with this file. If your business office will accept such a list, it can be attached to a purchase order which says "as per attached list." Remember that the list can be given to the business office or the jobber in any order: alphabetically by author, title, publisher.....

6. If you must prepare multiple copy order forms, a simple illustration is given here. Some adjustment will be needed to fit the form you must use. Check the various free template libraries for AppleWorks available nationally for some templates already in existence to do the type of form you use.

   Print out the **Sample.PO** using the "April/order" format. This format will print out all the items like the following example:

Author: Friedman, Ina R.
Title: How my parents learned to eat
Publisher: Houghton
Year: 1984
ISBN#: 0-395-35379-3
Copies: 2
Cost: 12.95

It is easy to arrange the information above any way you wish. Check an AppleWorks manual for details.

For an actual school, do the following:

1. Load **Consid.acq.file** and **On.order.temp** from the template disk.

2. Create the report format you would like to use to print out your purchase orders. Save the format with **On.order.temp**.

3. Do Boolean searching (Open Apple R) in **Consid.acq.file** to isolate the materials to be ordered for a specific date.

4. Copy, do not move these items to the **On.order.temp** file via the clipboard.

5. Print out an acceptable purchase list for the business office using either a tables or labels format. Arrange the list in any order requested by the business office or the jobber.

6. If you wish to save a single order in a separate file (not really necessary since it is all in your large file), you must rename this temporary file and save it.

Step 6

Receive Items

Useful templates on Side Three of the template disks:

Consid.acq.file - The database which should now contain both materials being considered for purchase and those which are on order.

Samp.acq.file.3 - The Sample School database which shows items which are being considered for purchase, those which are on order, and those which are received.

When items arrive from the jobber or the publisher, they must be checked against what was ordered. A printout from the Consid.acq.file for each order or the purchase order list can serve as the check-in list.

Those items which have been received should be entered into the Consid.acq.file by putting a "Y" or a star in the "Received" category. To facilitate new materials lists, the call number might be entered rather than a Y or a star.

Decisions must be made concerning items which were ordered but did not arrive. To keep the database up to date, do the following:

1. Load Consid.acq.file. Do not use the On.order.temp file!

2. For items which must be reordered, delete the "On order" date from the database.

3. For items out of print, an "op" might be entered in the "On order" category and the title left in the database. If the item is ordered again, the file will already contain the out of print notation and duplicate out of print orders will be avoided!

For practice, load Samp.acq.file.3 and note the "received" category. Try out any of the directions above until you are comfortable with the receiving operation.

Step 7

Bring the Budget Spreadsheet Up to Date

Useful templates from Side Three of the template disks:

Budget - The traditional budget which divides expenditures according to purchasing accounts, e.g., books, audiovisual, etc.

Sample.budget - The Sample School traditional budget.

Emphasis.budget - A budget which is divided according to the emphasis collections, basic, outstanding and annual purchases.

Sample.emph.bud - The Sample School budget which is divided according to emphasis collections.

In Chapter 4, two budget spreadsheets for an actual school were created and saved on Side Two and Side Three of the template disks: Budget and Emphasis.budget. After the invoices have been paid, the library media specialist should load the proper budget template from Side Three and enter the current expenditures. The budget spreadsheets

should tally amounts of money remaining in the various categories for future expenditure. If a number of materials from various emphasis collections have been lumped into an order, the emphasis budget can reflect estimates rather than actual "down to the penny" expenditures. There are charges for shipping and discount structures which make exact accounting unnecessary - that is the province of a business office. Save the spreadsheets if new data are entered in this step. Save the spreadsheets on Side Three if new data are entered.

Step 8

Create New Material Lists

Useful templates from Side Three of the template disks:

Consid.acq.file - This database now contains materials for purchase consideration, materials listed as on order, and materials that have been received.

Samp.acq.file.3 - The Sample School database containing considerations, on order, and received items.

It is a very simple matter to print out new material lists from the Consid.acq.file database. You may wish to practice using the Sample School first.

Working with the Sample School

Objective: To print out a new material list.

The **Samp.acq.file.3** has a sample printing report format already saved with the file. To use it, do the following:

1. Load **Samp.acq.file.3.**
2. Do Boolean searching to isolate those records where On order = Apr 86 and Received = Y. Arrange this subset in any order desired.
3. Print out using the "New.materials" format. (Open Apple P, get a report format, Return, Open Apple P)

For an actual school, follow the steps below:

1. Load Consid.acq.file.

2. Do Boolean searching in the file to isolate the records you wish to include in the new material list. You can create a list containing certain call number ranges, by requester, by emphasis area, or by order date.

3. Create a printing format either as a label or table style.

4. Print out the file.

Step 9

Create a New Collection Map

Useful templates from Side Three of the template disks:

Collect.chart - The giant spreadsheet which has the sections CURRENT COLLECTION CHART and PROPOSED COLLECTION CHART plus the section which will be used now: NEW COLLECTION CHART.

Sam.col.chart - A practice spreadsheet with data added from Phases One and Two.

Sam.col.chart.3 - A sample spreadsheet with data filled in all three sections.

Sam.col.chart.c - A sample spreadsheet used for alternative mapping technique #1.

New.map - A blank template for use in an actual school.

Sam.new.map - A new collection map for the Sample School.

You are now ready to draw a new collection map. This will make the third one you have drawn. Remember, the first showed what you started from last year and the second showed what you proposed to build. Your new map will show what success (or failure) you have had.

Load Collect.chart from Side Three of the template disks. Move to the section entitled NEW COLLECTION CHART. Since it has been some time since you entered the data in the previous sections, you will need to start almost from scratch. Fill in all the data as called for in Part I: Date, # of students... Then fill in the data asked for in Part II. If you have used the alternative mapping technique #1, the column "Students Who Use" will have to be filled in. If you need an example, check the **Sam.col.chart.3** on the template disk. The **Sam.col.chart.c** on

the template disk is an example where the alternative mapping technique #1 has been utilized.

Load **New.map** from the template disk, add the top portion from the spreadsheet via the clipboard, print out the file and draw the new bars. A sample has been prepared on the template disk entitled **Sam.new.map**.

A Final Note

Some library media specialists want to be able to input their AppleWorks files into catalog card creators or into on-line catalog systems for use rather than have to enter everything all over again. The requirements of the various programs will vary. Check with the producers of those programs to see if they will accept input from AppleWorks directly, through ASCII files or through DIF files.

Now what do you do next year? That depends on how much RAM memory you have and whether or not you have a hard disk. If you have a half meg of memory and hard disk space, you may just keep adding to **Consid.acq.file**. The advantage is that one file eliminates having to search many times to see if you already own a title, whether it is on order or whether it is being considered. The smaller the memory, the more often you will have to break up **Consid.acq.file**.

If you have to break up **Consid.acq.file** on an annual basis, move all the items you have received into one file. You will then have to search this file before adding anything to **Consid.acq.file**. Even if you have to break the file, it will be faster to search it than to check the card catalog.

Chapter 6:
Collection Evaluation

Chapter 6

Phase Four

COLLECTION EVALUATION

Collections are fluid. They change by growing, by being used up, by being stolen from and by being weeded. Demands on collections are also fluid, for student and teacher needs change in addition to curricular change. A quality collection fills the curricular demands made upon it. The measures of excellence, therefore, must bridge the gap between the variables of availability and demand. This means that administrators should know what impact expenditures on collections have had and from time to time will require evaluative evidence of that impact.

Evaluation is the method used to measure progress toward a goal. In the past ten years, many strategies for evaluation have been developed and tested. No one of these systems is perfect, yet most are usable. Evaluative evidence, communicated properly, may make a tremendous difference in the support for library media programs. But over time, presenting the same evidence may loose both its appeal and its impact.

For many years, evaluation of school library media programs centered on the comparison of what a local center had as compared to state or national standards. These standards were quantitative and required so much space, dollars and staffing per student. If that approach to evaluation still helps maintain support for library media programs, then that type of evaluation is still valuable. If, however, those figures have lost their impact, then it is time to present newer and fresher evidence from another perspective.

The purpose of this chapter is to explore different types of evidence which might be collected and presented to decisionmakers - knowing full well that over time, these measures are likely to fade into "commonness."

Perhaps the most sage advice on evaluation is to measure some programs of the library media center regularly and then use a variety of evaluative approaches over time. Communicating successes and challenges from a fresh perspective will keep attention focused on the library media program. Consistency in support is vital.

The evaluation measures presented in this chapter follow the standards which were outlined in Chapter One. The first three of those standards are linked with the computerized collection development system set forth in this manual. The last three standards are corollary to the collection development system and have measures designed to work independent of the system.

The techniques in brief will include:

1. Evidence that the collection of the library media center supports the curriculum of the school.

2. Documentation that a plan to build a curricular-oriented collection with the accompanying policies, staff expertise and realistic budgeting practices is in place.

3. Demonstration that an acquisition system which matches curricular priorities is in place.

4. Evidence that each type of media included in the library media center is considered as a system and is supported properly.

5. Confirmation that the library media collection is only one node in a network of collections which service the school.

6. Verification that the library media collection reflects democratic ideals, intellectual freedom and cultural diversity.

7. Easy-to-understand evidence of what is being spent on library media collections, how the money is being spent, what difference it is making and what should happen to the collection in the future.

Step 1

Evidence that the Collection Supports the Curriculum

Useful templates on Side Four of the template disks:

Quality.quest - A post-unit evaluation form to be filled out by the teacher and the library media specialist.

Samp.qual.quest - A sample post-unit evaluation from the Sample School.

Qual.eval.ss1 - A spreadsheet in which to record the data from each unit evaluation done by the library media specialist and the teacher.

Samp.ql.eval.1 - A spreadsheet from the Sample School which includes post-unit evaluation data.

Qual.eval.ss2 - A spreadsheet designed to analyze post unit evaluation data for a single department or topic in the curriculum.

Samp.ql.eval.2 - A spreadsheet from the Sample School which includes post-unit evaluation data for the science curriculum.

The key to measuring the quality of the collection is to measure the response of the collection after demands have been made upon it. At the conclusion of a unit which has attempted to draw upon library media materials, the teacher, students and the library media specialist should evaluate the collection's response.

Every time a substantial demand is made, an evaluative report should be filled out and then recorded in the spreadsheet **Qual.eval.ss1**. This process takes less than 10 minutes but is vital to the evaluation of the collection. If an emphasis area of the collection has been tested, then the evaluation score will be translated into a sticker to be affixed to the current collection map. If the demand has been on the basic collection, then a sticker will be placed on that part of the collection map.

Before instituting an evaluation system, it may be helpful to work with the Sample School.

Working with the Sample School

Objective: To do post-unit evaluations of the collection and record these ratings in a spreadsheet for analysis.

1. Have copies of the **Quality.quest** questionnaire form available for teacher/library media specialist post-unit rating.

2. Print out the **Samp.qual.quest** template from the disk.

3. Enter the data from the **Samp.qual.quest** into the **Samp.ql.eval.1** spreadsheet.

   a. Load **Samp.ql.eval.1**

   b. Put the cursor on any teacher's name <u>below</u> Roscoe or above the analysis line.

   c. Press Open Apple I and insert 1 line.

   d. Enter the data.

   e. Save the spreadsheet.

4. Study the "Average" column and the "Analysis by item" row. Not only are the averages provided for each unit evaluated but each rating is averaged. Thus we can study how well the collection responds across the disciplines in the "Currency" column. Ask questions such as: In what area does this collection respond well? In what areas is major improvement needed? In the Sample School, the collection rarely provides enough materials and it consistently <u>does not</u> provide materials which span the reading, viewing and listening level of the students. Such an observation would be evidence for a major push to correct the situation.

****

AppleWorks tip: If you study the formula to calculate the average questionnaire response, you will notice an interesting denomonator has been used. Since not all items of the questionnaire need be ranked, we need to sum up all the ratings but divide only by the number of ratings made, not always by 11. The formula: @SUM(H13...R13)/@COUNT(H13...R13) means that all ratings were added for the numerator and the denomonator is the number of non-blank cells. Thus if one rating was missing, the denominator would be 10, not 11.

****

5. Study how well the collection responds to a particular curricular area.

   a. Load **Qual.eval.ss2** and then **Samp.ql.eval.2** and finally **Samp.ql.eval.1** from the disk.

   b. In the **Samp.ql.eval.1** spreadsheet, arrange the "Curricular area" column by putting the cursor <u>just below</u> the label "Curricular Area," press Open Apple A, light up all the rows <u>but not</u> the "Analysis of item" row, press Return and select A-Z arrangement.

   c. All the science unit evaluations should now be together. Place the cursor on the science unit and press Open Apple C. Light up "To clipboard." Light up all the science rows and press Return. Press Open Apple Q and change to the **qual.eval.ss2** spreadsheet. Place the cursor just above the "Analysis of item" line. Press Open Apple C and light up "From clipboard" and press Return. All the science units should now be in the new spreadsheet.

   d. Now analyze each of the category means. Ask some questions. How well does the collection respond to science units? What are the strengths of the science collection? What are the failings? How do the ratings for science compare to the ratings for the collection as a whole?

****

AppleWorks tip: If you have extra lines in a spreadsheet, you will be tempted to delete them to "dress up" the look of the printout. If you delete the top row or the bottom row used to construct the formulas, then the formulas will be destroyed!!! You can delete any lines in between the top and bottom rows and still preserve the formulas. If you are bothered by the word "ERROR" in the top and bottom rows then use Open Apple B to blank these rows before you print out. The result should look like **Sam.ql.eval.2** on the template disk.

****

In an actual school, do the following:

1. Have copies of the **Quality.quest** questionnaire form available for teacher/library media specialist post-unit rating.

2. After rating a unit, enter the data in the **Qual.eval.ss1** spreadsheet. Check the formulas to see that all cells are being averaged. Use the averages for specific units as the basis of placing quality stickers on the collection map. Also, ask important questions such as:

a. In what area does this collection respond well?

b. In what areas is major improvement needed?

3. In order to study how well the collection is responding to a particular curricular area, arrange the spreadsheet by curricular topic and then copy the appropriate block of information to the **Qual.eval.ss2** spreadsheet. Check the formulas to see that all cells are being averaged. Inspect the data and ask important questions:

   a. How well does the collection respond to this particular curricular area?

   b. What are the strengths and weaknesses of this segment of the collection?

   c. How do the ratings for this segment of the collection compare to the ratings for the collection as a whole?

Communicate the findings of this analysis to decisionmakers and to the teachers and students who use the collection. If the quality stickers on the collection map are representative of how individual units have fared, these stickers might be replaced with some which represent averages across a number of units of instruction.

Step 2

Evidence of a Collection Building Plan

Standard 2 calls for documentation that there is a plan to build a curricular-oriented collection with the accompanying policies, staff expertise and realistic budgeting practices.

The documentation required, suggests that there be a written collection development policy. Many schools have written collection and selection policies, but if the system in this manual has been adopted, then the collection policy may need revision. Outside evaluators are usually interested not only if a printed selection policy exists but if it is actually used as the basis for collection building.

Excellent documentation that an actual plan for building the collection toward curricular targets are the three collection maps which were drawn in Chapters 2-4. These maps consist of:

a. A map showing current collection strengths.

b. A map showing proposed collection targets.

c. A new map showing progress made after materials have been purchased.

A file folder showing older collection maps which can be compared to newer ones would be convincing evidence of direction and progress toward collection building goals. Progress in both quality and quantity should be noted. Progress over time could be noted not only in small collection maps but in transparency overlays which would be useful for group presentation.

One component of a sound acquisition system is the expertise of the library media specialist in choosing and acquiring quality materials. Expertise becomes evident as the library media specialist spends money. Good spending practices will result in higher ratings by teachers and students when they evaluate how well the collection responds to unit demands. Over a period of time, teachers and decisionmakers will increase their confidence in a library media specialist who, given $1,000, knows how to get the best materials to match curricular needs. Asking teachers and students directly about the library media specialist's expertise to choose the best materials is one way to probe this area of concern.

Finally, the standard asks for evidence that budgetary efforts are realistic and are pointed toward curricular concerns. Not only will plans for future expenditures be valuable evidence, but an analysis of current and previous expenditures by curricular area will be important. If a spreadsheet has been kept as suggested in the **Emphasis.budget**, then ample evidence of where the money has been proposed and expended is available.

Whether the money budgeted and expended has been realistic is a major question. A professional judgment in this area is a variable of two questions:

a. Are reasonable collection building targets in place?

b. Are budgets of sufficient size to make annual progress toward collection building goals?

Low collection building targets and large fluctuations in spending would not be impressive to an evaluator of consistent or realistic support. Lack of support will become evident in the downward trend of quality ratings from teachers and students.

Step 3

An Appropriate Acquisition System

Standard Three suggests that an acquisition system which matches curricular priorities should be in place.

Evidence suggested includes:

a. Documents indicating purchase targets. The collection maps, both current, proposed, and new provide this.

b. Evidence that teachers and administrators participate in collection building. How did these groups help decide the purchase targets represented in the proposed collection map? Were teachers involved in suggesting the types of materials that should be purchased for each emphasis collection and the basic collection?

c. How does the use of the computerized consideration file indicate that selection is being done systematically by curricular area?

d. Do sample purchase orders evidence targeted purchasing? Are the materials received promptly processed and proper notification to subject departments made?

Step 4

Each Type of Media as a System

As mentioned earlier, it would be wise to look at each of the technologies of the library media collection and consider each as a system with many facets. In education, so many technologies seem to appear on the horizon, are tried, and fade into oblivion. Many times, this failure is not based on what the technology can offer to education, but is due to the lack of support for the technology as a system.

Computers used as instructional tools is one of the latest of a long line of technologies to attract educators. The school administrator who rushes out and buys a single computer, puts it in the library media center, and then expects great things to happen, is likely to be disappointed. With no purpose for the technology, no support, no followup, little is likely to develop on its own momentum.

The following evaluation technique probes the support an educational technology is receiving in a school by first looking at the goals, then the resources available and finally the processes used by

the school to support the chosen technology. If a technology cannot be supported properly, then it ought not to be advertized as a part of the library media program.

The steps to evaluation are as follows:

1. Decide on one or more technologies to be evaluated. Examples could be computer-assisted instruction, 16mm film, Online database searching, audio tape recording, 35mm slides, overhead projectors and transparencies, filmstrips, etc.

2. Duplicate two copies of the evaluation form for each type of media to be evaluated.

3. Have both the administrator and the library media specialist rate the items on the form independently. Items considered inappropriate or not applicable need not be rated.

4. Chart the ratings of both raters on a single form.

5. In conference, discuss any differences in ratings and all ratings below a 4.

6. In conference, ask and answer the following questions:

   a. Is our support for this technology sufficient to make it a success in this school?

   b. Is our level of involvement in this technology appropriate for our school?

   c. Should we abandon this technology in favor of other technologies we could support better? In other words, should we support a few technologies well or a number on a cursory level?

   d. What steps should we take to improve our support for this technology?

7. Prepare plans and implement them.

A copy of the questionnaire is on Side Four of the template disks under the title **Tech.eval.quest.** The data from the questionnaire can be analyzed in the spreadsheet **Tech.eval.anal.** A sample is provided in **Tech.eval.samp.**

Step 5

Local Collections and Networks

Standard Five suggests that no collection can be large enough to satisfy the needs of all the teachers and students. Rather, every library media center should be a node in a network. That network of collection sharing and collection building cooperation begins in the local community and reaches out through regions and on to the state and national sources.

Evidence of cooperative sharing and collection building is not hard to produce. Are there formal contracts and agreements with other libraries? Is there evidence of network membership? Is there evidence of use of networks both as a lender and as a borrower? If the school is a net borrower, why? Are materials being borrowed supplementary or do they represent materials which should be owned locally? With a few exceptions, consistent borrowing of the same materials at a high frequency would be evidence that the school should own the materials.

Some schools might have collection building agreements with neighboring schools with the appropriate sharing agreements and delivery systems in place. For example, one school might collect a Civil War collection, another a Revolutionary War collection. Easy order and delivery services would make both these collection available to the two faculties and students. Such a cooperative arrangement is easily documented.

Step 6

Collection Diversity

Standard Six asks whether the collection reflects democratic ideals, intellectual freedom and cultural diversity. Pressure from individual parents and groups is often directed toward limiting what children and young people have access to. On the other hand, the foundation of a democratic society, dictates that children and young people have access to diverse materials and learn early to build informed points of view.

Does the library media specialist, the administration and the faculty support the School Library Bill of Rights? Would they even know what the document was if it were mentioned?

Is there evidence that selection practices provide for the inclusion rather than the exclusion of a broad spectrum of opinion and culture?

Given a current controversial topic, could the library media specialist produce materials representative of political ideas, popular and unpopular ideas including materials of varying cultures?

The answers to these questions are often not cut and dried. A consistency of policy and a familiarity with principles by administrators and faculty are first steps to success. Successful meeting of challenges to materials often cannot be accomplished without a long history of awareness efforts. Protecting the rights of children, young people in a democratic society is not won in a day or by a single event. Evidence of consistent efforts toward enlightenment are much more impressive.

Step 7

Easy-to-Understand Evidence

To have embarked upon a totally new system and lack the means of communicating to decisionmakers in easy-to-understand language would be a major error. Library media specialists need to recognize that what is meaningful to them may not be meaningful to a teacher, a student, an administrator or a school board member.

Persons who are willing to take a few minutes to consider reports, charts, or presentations from the library media staff expect concise and understandable information. There are many models of communicating plainly. Some of the best charts and reports of research are printed each week in publications such as Time, Newsweek and USA Today.

Before preparing presentations, try to think in terms of the audience who will listen. What is their background in library media centers? What terminology do they understand? What do they value in terms of education and libraries in general? What illustrations and examples would be meaningful from their perspective?

Generally, the briefer and the clearer the presentation, the greater the impact. Very few people have the time and the determination to wade through complex statistics or jargonistic reports to try to ferret out an overall conclusion.

It would be better to present short glimpses of the collection development process to decisionmakers more often and in a clearer manner than to write a lengthy report.

There are essentially four main questions to answer for decisionmakers concerning collections:

1. What's happening to collections?

2. Where has the money gone?

3. What difference has the money made?

4. What should happen in the future?

The first question is easy to understand using the various collection maps which have been drawn. Three have been suggested: the current map, the proposed map and the new map -- showing where the collection was, where it needed to go and if it arrived. These maps can be used as they stand or can be combined into a more succinct chart or graph which shows progress or the lack of it. The key is that the viewer instantly can understand what has happened to the collection over time. No matter what graphing technique or chart or words are used -- be sure that the non-library media specialist gets a true picture of the collection development efforts.

What's happened to the money? If the spreadsheet **Emphasis.budget** has been used regularly over a period of time, then the library media specialist can show exactly how much money has supported various segments of the collection. Use the spreadsheet data to construct charts or graphs which detail expenditures over time. Again, whatever product is prepared, it must be easy to understand.

The third question is perhaps the most important. What difference do library media collections make? The post-unit teacher/library media specialist questionnaires have been the basis for evaluation in the system proposed here. The template **Qual.eval.ssl** is the most important source of data. Create easy-to-understand summaries of the data, stickers for the collection maps or some other technique to help the non-specialist answer the question truthfully. The link between money and quality can only be made when specific demands on the collection are documented.

Helping decisionmakers to understand the possibilities of where collections might go is extremely important. Considering local problems and constraints, it is often tempting to be very conservative in asking for resources. At other times, asking for the moon with a swirl of whipped cream and a cherry obtains significant results. There is a fine line between asking for a major increase in funding and making it believable and being cast as a dreamer of the impossible. If there was any one technique of asking and promoting larger budgets and collections, we would all have been using it for the last 100 years. In the 1960's when McCall's magazine printed an article that said "Americans spend more on dog food than on books for elementary school libraries," the nation was launched into an era of major spending for school libraries. What will work for you?

APPENDIX 1

STANDARDS TO BUILD COLLECTIONS

Standard 1: The collection of a library media center must support the curriculum of the school.

Standard 2: A plan to build a curricular-oriented collection with the accompanying policies, staff expertise and realistic budgeting practices is in place.

Standard 3: An acquisition system which matches curricular priorities is in place.

Standard 4: Each type of media included in the library media center is considered a system consisting of the materials, the accompanying equipment, the support staff, and facilities among other concerns.

Standard 5: Collections in single schools are constantly changing to meet current needs. Collections are supplemented from local, regional and national networks.

Standard 6: Collections reflect democratic ideals, intellectual freedom and cultural diversity.

APPENDIX 2

Computerized Collection Development

Phase 1:

Collection Mapping

Phase 2:

Mapping In Depth

Phase 3:

Computerized Acquisition

Phase 4:

Collection Evaluation

Acquisition Database

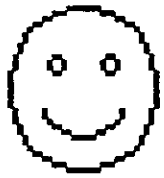
--- Consideration File
--- On-order File
--- Received File

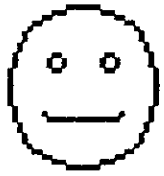
Curriculum Study

Proposed Emphasis Areas

Model Collection Map with Budget

COLLECTION EVALUATION

Excellent 

Fair 

Needs Help

APPENDIX 3

PHASE ONE

MAPPING THE COLLECTION

1. Fill out the Collection Map Questionnaire.

2. Enter the counts into the "Collect.chart" spreadsheet on the template disk.

3. Evaluate the quality of the collection segments charted in the collection map.

4. Create a collection map for public display.

5. Use the collection map in collection building.

6. Consider alternative collection mapping strategies.

Collection Map Questionnaire

General Information

1. School Name _____
   Your Name _____
   School Address _____
   School Phone _____
2. Grade levels included in your school _____
3. Total number of students in your school _____

Total Collection Size

Estimate the total number of items in each Dewey Classification *

Reference _____	400 _____	Biography _____
000 _____	500 _____	Fiction _____
100 _____	600 _____	Story Collection _____
200 _____	700 _____	Easy (Elem. only) _____
300 _____	800 _____	Periodicals _____
398.2 _____ (Elem. only)	900 _____	Prof. Collection _____

Total # of items _____ (can be done in the spreadsheet)
Total # of items per student _____ (can be done in the spreadsheet)

Emphasis Areas

Area Name	General or Specific	# of items	items/ student	# of students who use this topic	items/ student who use
1.					
2.					
3.					
4.					
5.					
6.					
7.					
8.					

(Items/student and items/student who use the topic can be done in the spreadsheet.)

* Many schools have counts segmented by Dewey classes for state reports. If not easily available, a total collection size is all that is essential.

Sample School
Collection Map Questionnaire

General Information

1. School Name Washington
   Your Name _____
   School Address _____
   School Phone _____
2. Grade levels included in your school K-6
3. Total number of students in your school 597

Total Collection Size

Estimate the total number of items in each Dewey Classification *

Reference	259	400	110	Biography	496
000	86	500	1112	Fiction	1343
100	39	600	499	Story Collection	61
200	56	700	516	Easy (Elem. only)	1641
300	407	800	247	Periodicals	19
398.2 (Elem. only)	305	900	981	Prof. Collection	112

Total # of items 8289 (can be done in the spreadsheet)
Total # of items per student 13.88 (can be done in the spreadsheet)

Emphasis Areas

	Area Name	General or Specific	# of items	items/ student	# of students who use this topic	items/ student who use
1.	Folk/Ftls	G	305	.51		
2.	Animals	G	263	.44		
3.	Indians	S	150	.25		
4.	Frt/pion/lf	S	79	.13		
5.	Dinosaurs	S	53	.09		
6.						
7.						
8.						

(Items/student and items/student who use the topic can be done in the spreadsheet.)

* Many schools have counts segmented by Dewey classes for state reports. If not easily available, a total collection size is all that is essential.

File: Calculate

April, 1986

CALCULATE TOTAL COLLECTION SIZE

(In column B, enter # of items you have under each category)

Ref.
000
100
200
300
398.2(Elem.only)
400
500
600
700
800
900
Biography
Fiction
Story collection
Easy(Elem.only)
Periodicals
Prof.Collection

# of students

Total collection: @SUM(B7...B24)
Items/students +B28/B26

File: Samp.calculate

CALCULATE TOTAL COLLECTION SIZE

(In column B, enter # of items you have under each category)

Ref.	259
000	86
100	39
200	56
300	407
598.2(Elem.only)	305
00	110
500	1112
600	499
700	516
800	247
900	981
Biography	496
Fiction	1343
Story collection	61
Easy(Elem.only)	1641
Periodicals	19
Prof.Collection	112
# of students	597
Total collection:	8289
Items/students	13.88

File: Collect.chart

CURRENT COLLECTION CHART

Part I.
(Enter your data in column B)

Date:
School Name:
Number of Students:
Total Collection Size:
Items/Student: ERROR
All student calc. method ok? (Enter your answer in B13)
(1=yes, 2=no)

Part II. Emphasis Areas

(Enter area names in column A, # of items in column B.
If you choose to map your collection by number of students who use the area, enter the figure in column C. This spreadsheet prepares you to enter 10 general and 20 specific emphasis areas. If you have more than 30 areas to record, please insert the rows you need, and construct the formulas).

Area Name	# of Items	Students Who Use	Items/ Student
A. General Emphasis Areas			
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
B. Specific Emphasis Areas			
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR

CURRENT COLLECTION CHART

Part I.
(Enter your data in column B)

Date:
School Name:
Number of Students:
Total Collection Size:
Items/Student: +B10/B9
All student calc. method ok? (Enter your answer in B13)
(1=yes, 2=no)

Part II. Emphasis Areas

(Enter area names in column A, # of items in column B.
If you choose to map your collection by number of students
who use the area, enter the figure in column C. This
spreadsheet prepares you to enter 10 general and 20 specific
emphasis areas. If you have more than 30 areas to record,
please insert the rows you need, and construct the formulas).

Area Name	# of Items	Students Who Use	Items/ Student
A. General		@IF(B13=1,B9,@NA)	@IF(B13=2,B29/C29,B29/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B30/C30,B30/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B31/C31,B31/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B32/C32,B32/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B33/C33,B33/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B34/C34,B34/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B35/C35,B35/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B36/C36,B36/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B37/C37,B37/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B38/C38,B38/B9)
B. Specific			
		@IF(B13=1,B9,@NA)	@IF(B13=2,B40/C40,B40/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B41/C41,B41/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B42/C42,B42/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B43/C43,B43/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B44/C44,B44/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B45/C45,B45/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B46/C46,B46/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B47/C47,B47/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B48/C48,B48/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B49/C49,B49/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B50/C50,B50/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B51/C51,B51/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B52/C52,B52/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B53/C53,B53/B9)
		@IF(B13=1,B9,@NA)	@IF(B13=2,B54/C54,B54/B9)

File: Sam.col.chart.3

CURRENT COLLECTION CHART

Part I.
(Enter your data in column B)

Date:	Sept. 5, 1986
School Name:	Washington
Number of Students:	597
Total Collection Size:	8289
Items/Student:	13.88
All student calc. method ok? (1=yes, 2=no)	(Enter your answer in B13) 1

Part II. Emphasis Areas

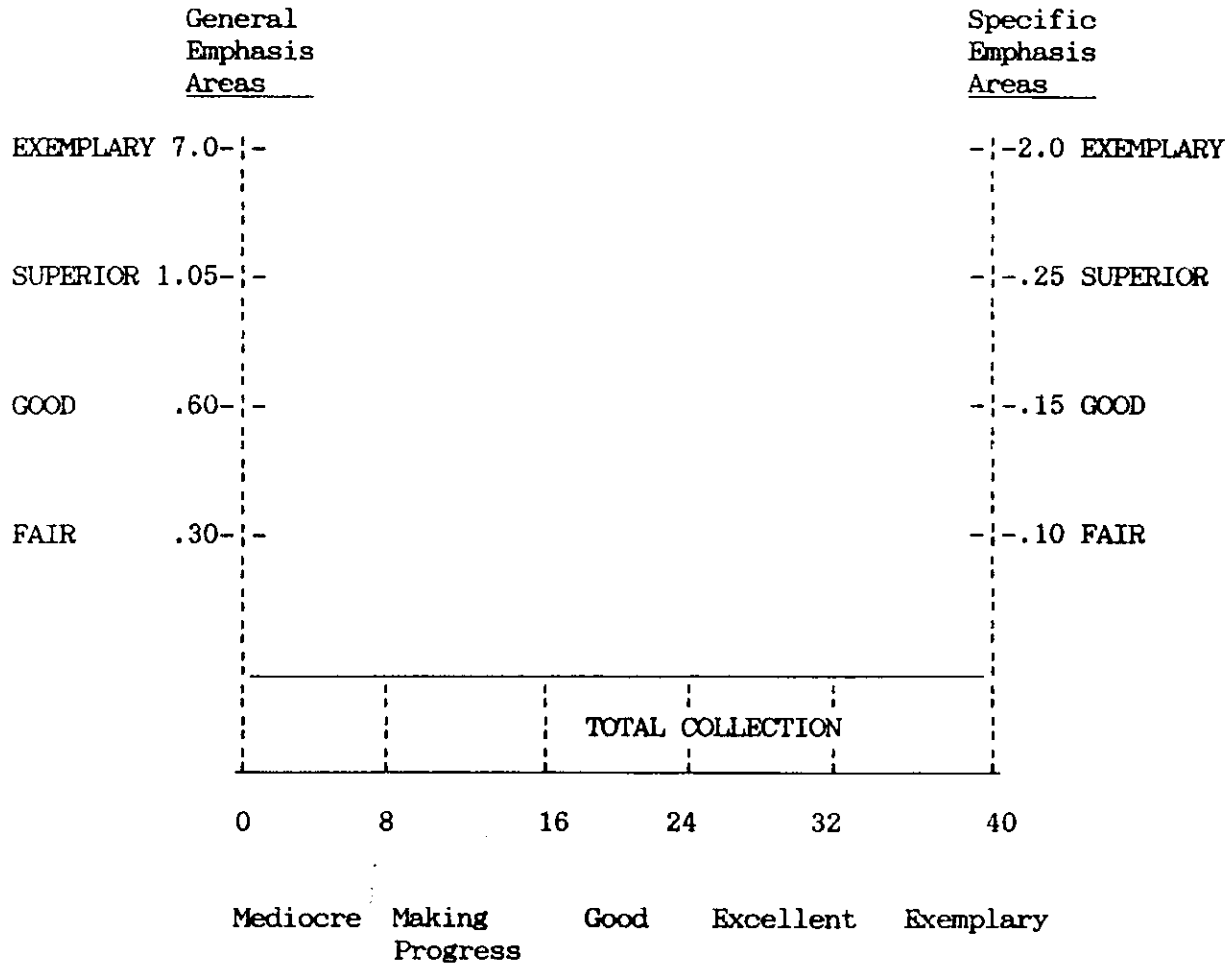
(Enter area names in column A, # of items in column B. If you choose to map your collection by number of students who use the area, enter the figure in column C. This spreadsheet prepares you to enter 10 general and 20 specific emphasis areas. If you have more than 30 areas to record, please insert the rows you need, and construct the formulas).

Area Name	# of Items	Students Who Use	Items/ Student
A. General Emphasis Areas			
G1. Folklore & fairytales	305	597	.51
G2. Animals	263	597	.44
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
B. Specific Emphasis Areas			
S1. Indians of North America	150	597	.25
S2. Frontier & pioneer life	79	597	.13
S3. Dinosaurs	53	597	.09
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00
		597	0.00

CURRENT COLLECTION MAP

Date:
School Name:
No. of Students:
Total Collection Size:
Items/student:

Emphasis Area Name # of Items Items/Student

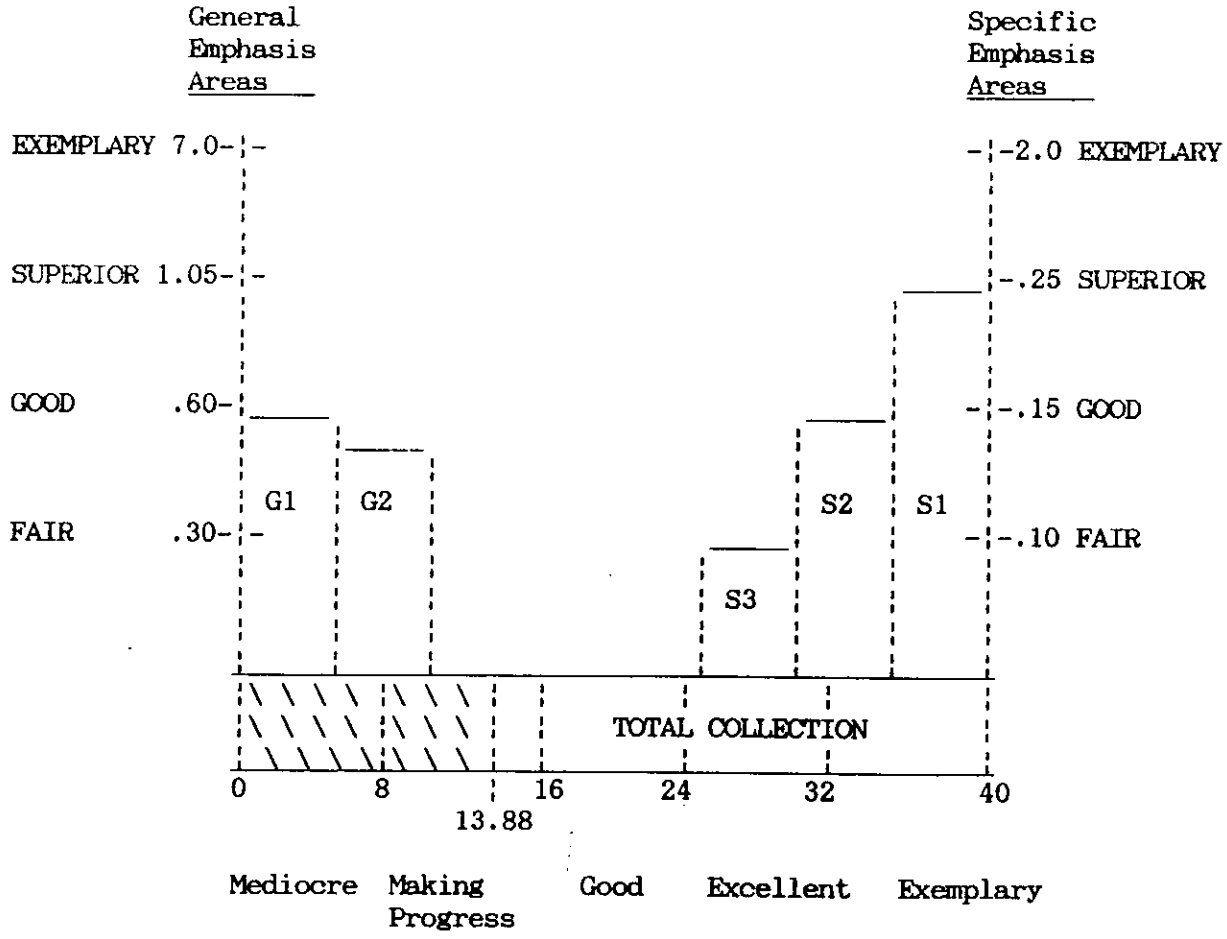


(Note: All numbers charted in items per student.)

SAMPLE ELEMENTARY SCHOOL
CURRENT COLLECTION MAP

Date:	Sept. 5, 1986
School Name:	Washington
No. of Students:	597
Total Collection Size:	8,289
Items/student:	13.88

Emphasis Area Name	# of Items	Items/Student
G1. Folklore & fairytales	305	.51
G2. Animals	263	.44
S1. Indians of North America	150	.25
S2. Frontier & pioneer life	79	.13
S3. Dinosaurs	53	.09



(Note: All numbers charted in items per student.)

ASSESSMENT OF THE LIBRARY MEDIA COLLECTION'S RESPONCE TO CURRICULAR DEMANDS

Directions: Together, library media specialists, teachers and students should answer the following items:

Teacher's name: _____ Lib. med. spec. name: _____
Curricular area: _____ Unit title: _____
Emphasis collection used: _____
Grade level: _____ Date evaluated: _____

1. How heavily did the collection get used for this unit?

_____ Scale: 5 = Very heavy use
4 = Heavy use
3 = Moderate use
2 = Some use
1 = Not used

_____ Actual circulation or use figures (optional)

If not used, why? _____
(Reasons for non-use may be rated in question 2)

2. How well did the emphasis collection respond to unit objectives: Rate only those that apply using the scale:

SCALE: 5 = excellent
4 = above average
3 = average
2 = below average
1 = poor

_____ Variety of media (print, AV, computer).
_____ Materials which are current (as required by the topic studied).
_____ Materials relevant to needs.
_____ Materials which are durable and in good repair.
_____ Enough materials for the number of students studying the unit.
_____ Materials which span the reading/viewing/listening/comprehension levels of the students.
_____ Materials which appeal to student interests.
_____ Materials which span opinion/cultural/political issues if appropriate.
_____ Ease of access to materials, equipment and facilities given reasonable time for planning.
_____ New materials purchased for this unit.

_____ AVERAGE RATING (include only the rated items) (can be done in the spreadsheet)

Quality rating symbol for collection map:

*** gold medal ***	5.00-4.50
** silver medal **	4.49-4.00
* bronze medal *	3.99-3.00
" frowny face "	below 3.00

3. Teaching techniques used:

4. Media activities:

   a. Information, production, research, and study skills taught (if needed):

   b. Other activities involving library media materials (brief description):

   c. How well did the activities contribute to the unit?

5. What do we need that we don't have? (books, AV, periodicals, etc.)

6. How well did the LMC staff, facilities, and equipment function?

7. How well did students respond to the LMC activities and materials?

8. What type of learners were short-changed?

9. Compliments and notes for improvement?

ASSESSMENT OF THE LIBRARY MEDIA COLLECTION'S RESPONCE TO CURRICULAR DEMANDS

Directions: Together, library media specialists, teachers and students should answer the following items:

Teacher's name: Mrs. Jones Lib. Med. spec. name: Nancy Smith
Curricular area: Science Unit title: Dinosaurs
Emphasis Collection Used: Dinosaurs
Grade level: 3 Date evaluated: Oct. 1986

1. How heavily did the collection get used for this unit?

   4

   5 = Very Heavy use
   4 = Heavy use
   3 = Moderate use
   2 = Some use
   1 = Not used

   _____ Actual circulation or use figures (optional)

   If not used, why? _____
   (Reasons for non-use may be rated in question 2)

2. How well did the emphasis collection respond to unit objectives:
   Rate only those that apply using the scale:

   SCALE: 5 = excellent
   4 = above average
   3 = average
   2 = below average
   1 = poor

   4 Variety of media (print, AV, computer).
   _____ Materials which are current (as required by the topic studied).
   4 Materials relevant to needs.
   3 Materials which are durable and in good repair.
   2 Enough materials for the number of students studying the unit.
   3 Materials which span the reading/viewing/listening/comprehension levels of the students.
   5 Materials which appeal to student interests.
   _____ Materials which span opinion/cultural/political issues if appropriate.
   4 Ease of access to materials, equipment and facilities given reasonable time for planning.
   5 New materials purchased for this unit.

3.8 AVERAGE RATING (include only the rated items) (can be done in the spreadsheet)

Quality rating symbol for collection map:

*** gold medal ***	5.00-4.50
** silver medal **	4.49-4.00
* bronze medal *	3.99-3.00
" frowny face "	below 3.00

3. Teaching techniques used:

   Discovery, teach one -- train one.

4. Media activities:

   a. Information, production, research and study skills taught (if needed):

      How to use the opaque projector.
      Identifying a subject catalog card.

   b. Other activities involving library media materials (brief description):

      Made large posters of favorite dinosaurs.
      Held a dinosaur trivia contest.
      Used a computer simulation in a teach one -- train one mode.

   c. How well did the activities contribute to the unit?

      The opaque activity went very well.
      The computer simulation was too difficult for the students to handle.

5. What do we need that we don't have? (books, AV, periodicals, etc.)

   Many more pictorial sources.
   A computer simulation which is easier.
   Several more reference books on dinosaurs.

6. How well did the LMC staff, facilities, and equipment function?

   Everything went very well.

7. How well did students respond to the LMC activities and materials?

   With the exception of the computer simulation, the students enjoyed the unit very much.

8. What type of learners were short-changed?

   Those who don't read well.

9. Compliments and notes for improvement?

   Definitely worth doing again.
   Either purchase or borrow many more materials.

ALTERNATIVE COLLECTION MAPS

1. Charted as items/# of students who use the topic.

2. Quality vs. quantity on the same map.

3. Mapping a specific emphasis collection for quality and quantity.

4. Mapping an entire course by unit of instruction.

5. Mapping a type of AV media.

6. Draw a positive/negative collection map.

7. Use computer graphing packages.

File: Sam.col.chart.c

CURRENT COLLECTION CHART

Part I.
(Enter your data in column B)

Date:	Sept. 5, 1986
School Name:	Washington
Number of Students:	597
Total Collection Size:	8289
Items/Student:	13.88
All student calc. method ok? (1=yes, 2=no)	(Enter your answer in B13) 2

Part II. Emphasis Areas

(Enter area names in column A, # of items in column B. If you choose to map your collection by number of students who use the area, enter the figure in column C. This spreadsheet prepares you to enter 10 general and 20 specific emphasis areas. If you have more than 30 areas to record, please insert the rows you need, and construct the formulas).

Area Name	# of Items	Students Who Use	Items/ Student
A. General Emphasis Areas			
G1. Folklore & fairytales	305	350	.87
G2. Animals	263	597	.44
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
B. Specific Emphasis Areas			
S1. Indians of North America	150	80	1.88
S2. Frontier & pioneer life	79	60	1.32
S3. Dinosaurs	53	60	.88
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR
		NA	ERROR

Sample School
Collection Map Questionnaire

General Information

1. School Name Washington
   Your Name _____
   School Address _____
   School Phone _____
2. Grade levels included in your school K-6
3. Total number of students in your school 597

Total Collection Size

Estimate the total number of items in each Dewey Classification *

Reference	259	400	110	Biography	496
000	86	500	1112	Fiction	1343
100	39	600	499	Story Collection	61
200	56	700	516	Easy (Elem. only)	1641
300	407	800	247	Periodicals	19
398.2 (Elem. only)	305	900	981	Prof. Collection	112

Total # of items 8289 (can be done in the spreadsheet)
Total # of items per student 13.88 (can be done in the spreadsheet)

Emphasis Areas

	Area Name	General or Specific	# of items	items/ students	# of students who study this topic	items/ students who study
1.	Folk/Ftls	G	305	.51	350	.87
2.	Animals	G	263	.44	597	.44
3.	Indians	S	150	.25	80	1.88
4.	Frt/pion/lf	S	79	.13	60	1.32
5.	Dinosaurs	S	53	.09	60	.88
6.						
7.						
8.						

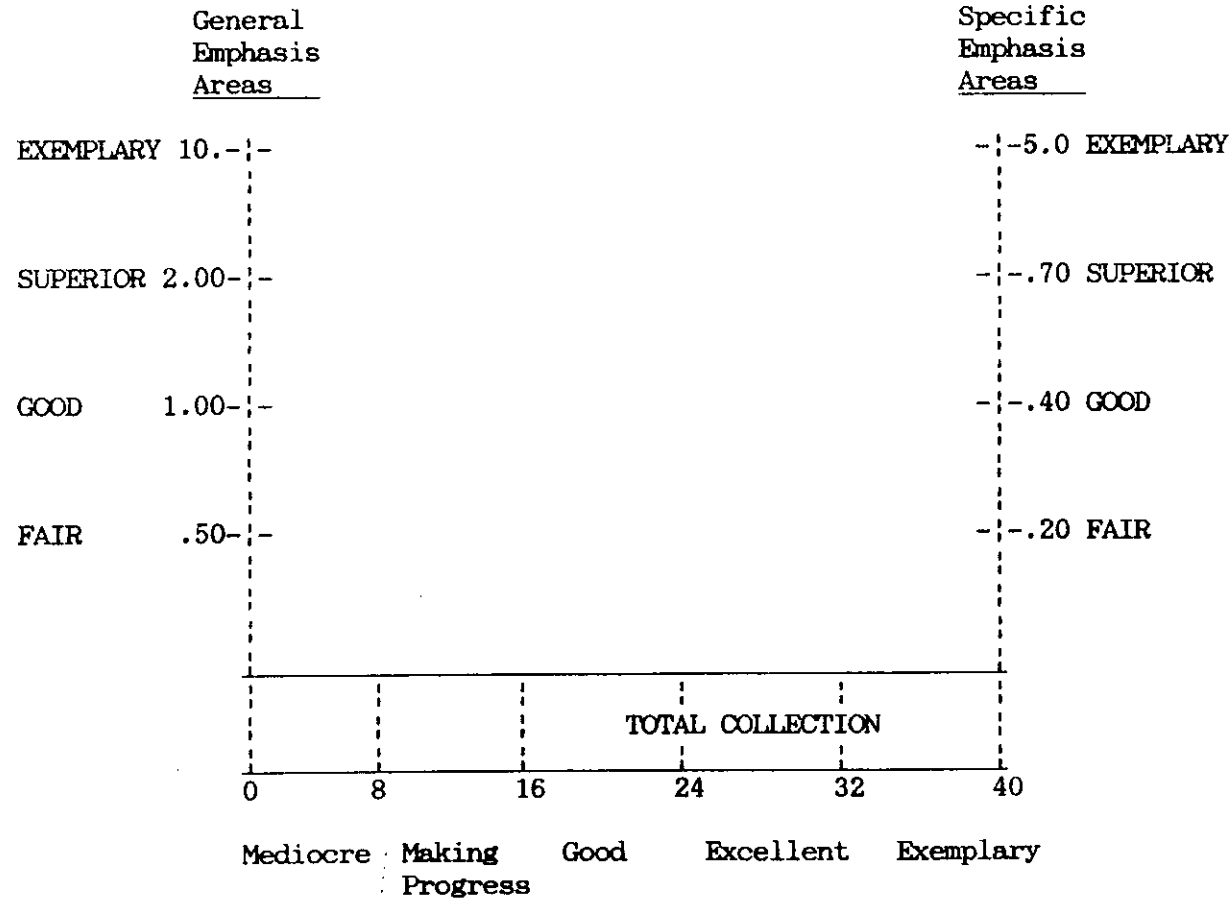
(Items/students and items/students who study the topic can be done in the spreadsheet.)

* Many schools have counts segmented by Dewey classes for state reports. If not easily available, a total collection size is all that is essential.

ALTERNATIVE COLLECTION MAP

Date:
School Name:
No. of Students:
Total Collection Size (Items/Student):

Emphasis Area Name # of Items* # of Students Who Use**

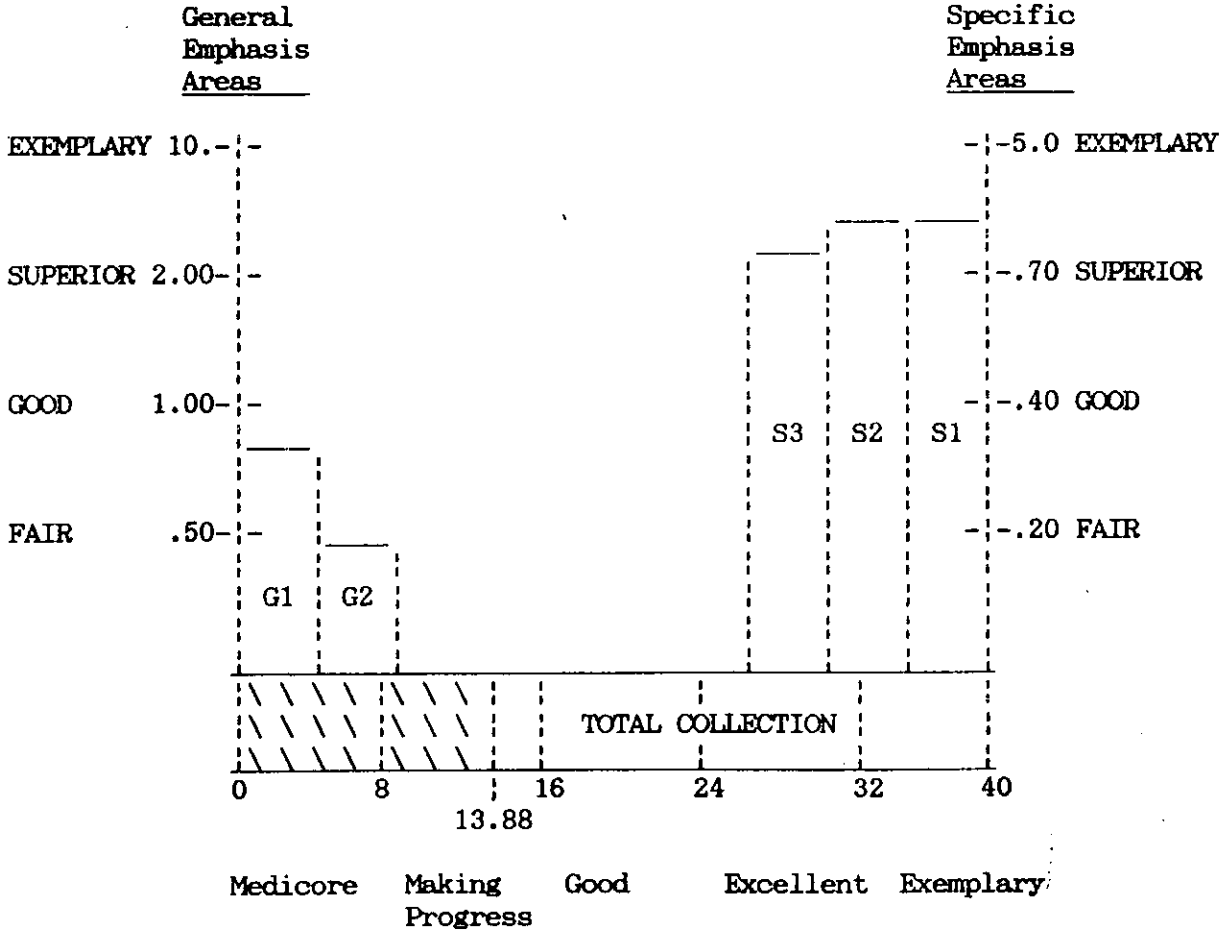


Note: * Figures in parentheses indicate # of items/total # of students.
** Figures in parentheses indicate # of items/students who use the topic.

SAMPLE ALTERNATIVE COLLECTION MAP

Date: Sept. 6, 1986
School Name: Washington
No. of Students: 597
Total Collection Size (Items/Student): 8,289 (13.88)

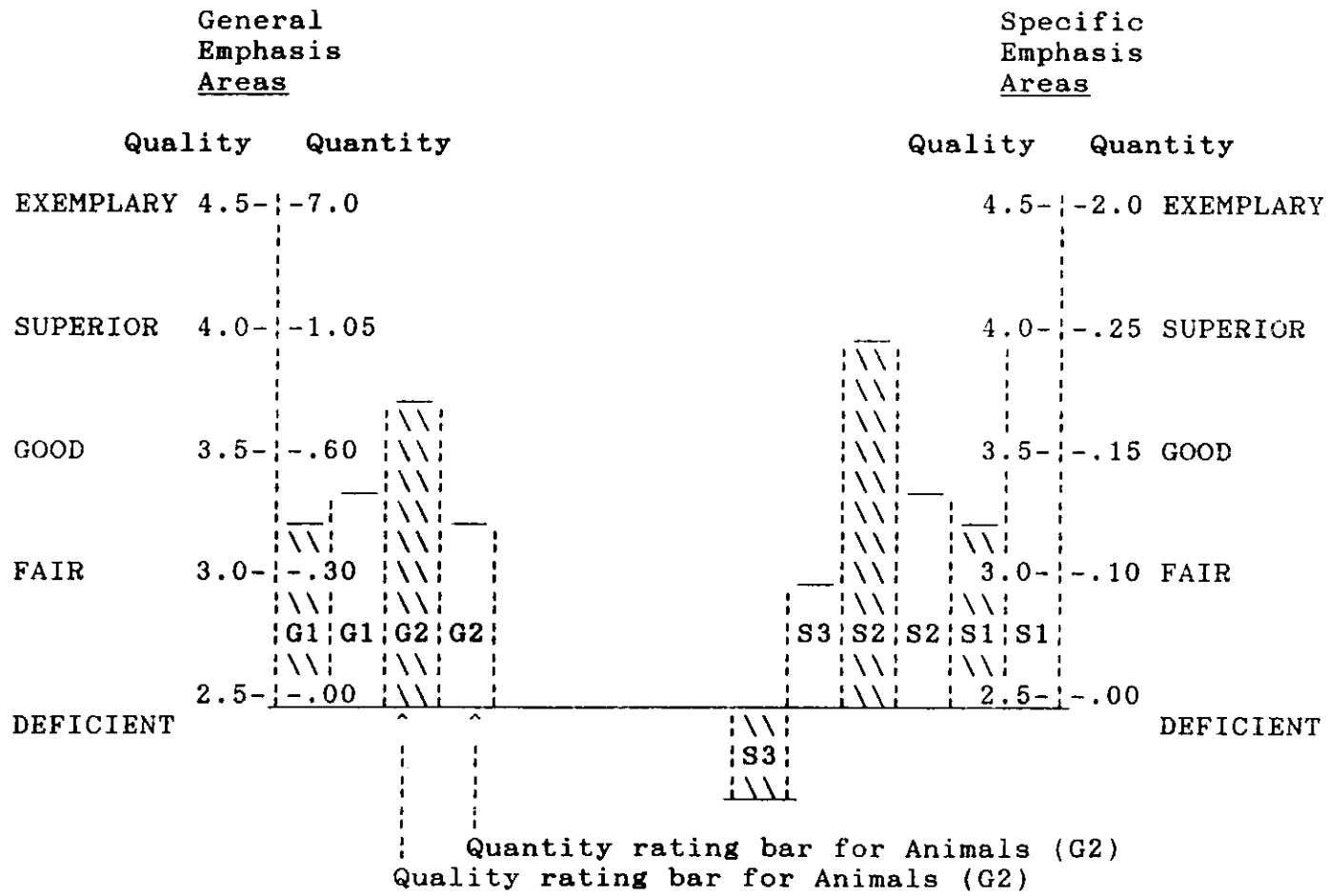
Emphasis Area Name	# of Items*	# of Students Who Use**
G1. Folklore & fairytales	305 (.51)	350 (.87)
G2. Animals	263 (.44)	597 (.44)
S1. Indians of North America	150 (.25)	80 (1.88)
S2. Frontier & pioneer life	79 (.13)	60 (1.32)
S3. Dinosaurs	53 (.09)	60 (.88)



Note: * Figures in parentheses indicate # of items/total # of students.
** Figures in parentheses indicate # of items/students who use the topic.

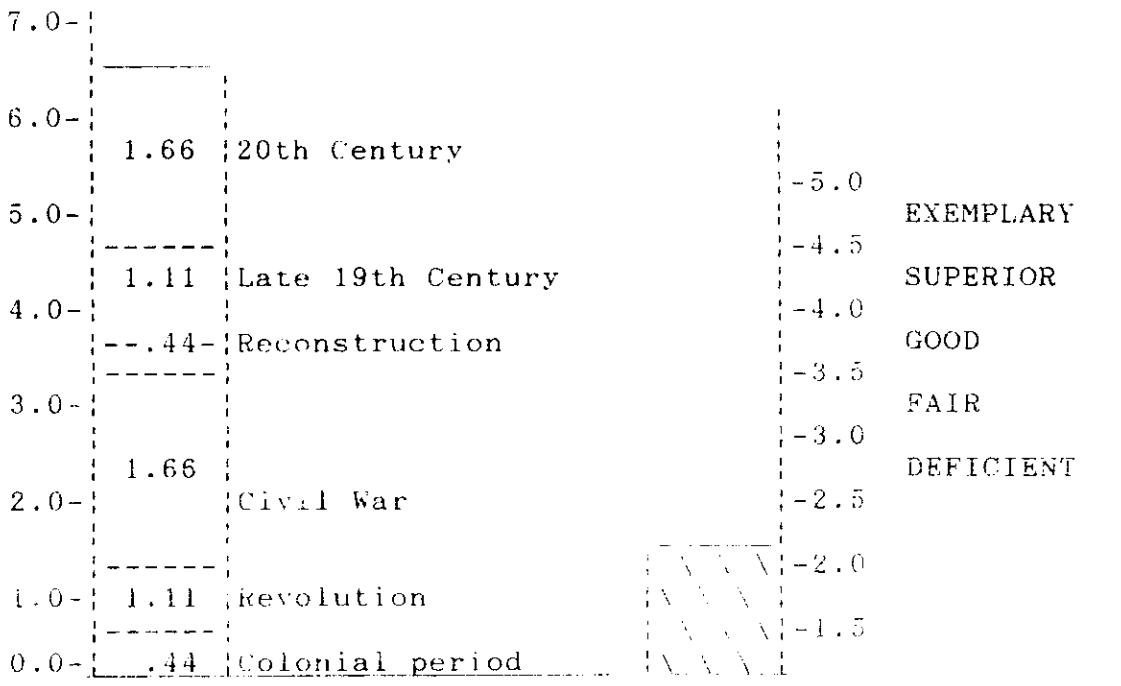
COLLECTION MAP
QUALITY AND QUANTITY

Emphasis Area Name	# of Items	Items/Student
G1. Folklore & fairytales	305	.51
G2. Animals	263	.44
S1. Indians of North America	150	.25
S2. Frontier & pioneer life	79	.13
S3. Dinosaurs	53	.09



Note: Quantity rating bars were charted by items/student. Quality rating bars indicated the average quality as rated by students and teachers.

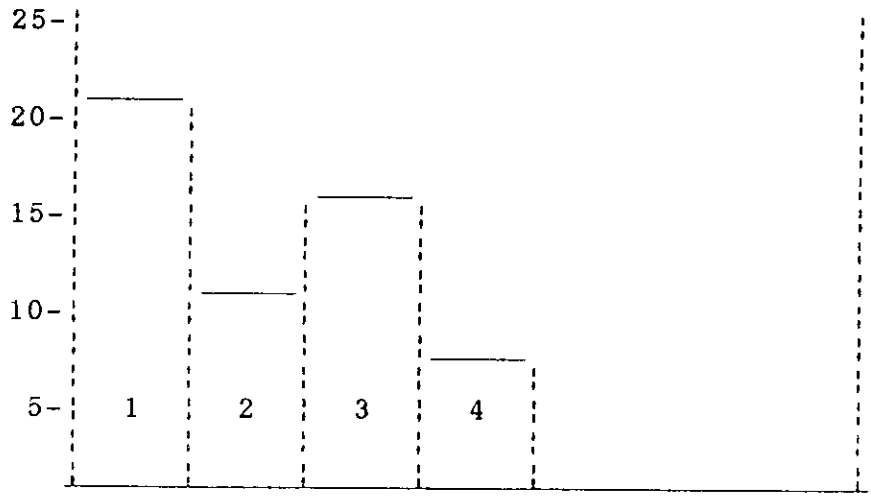
U. S. HISTORY COLLECTION



Total Items = 1160
# of students using U.S. History = 180
Items/student using U.S. History = 6.44

COMPUTER SOFTWARE
BY CURRICULAR AREA

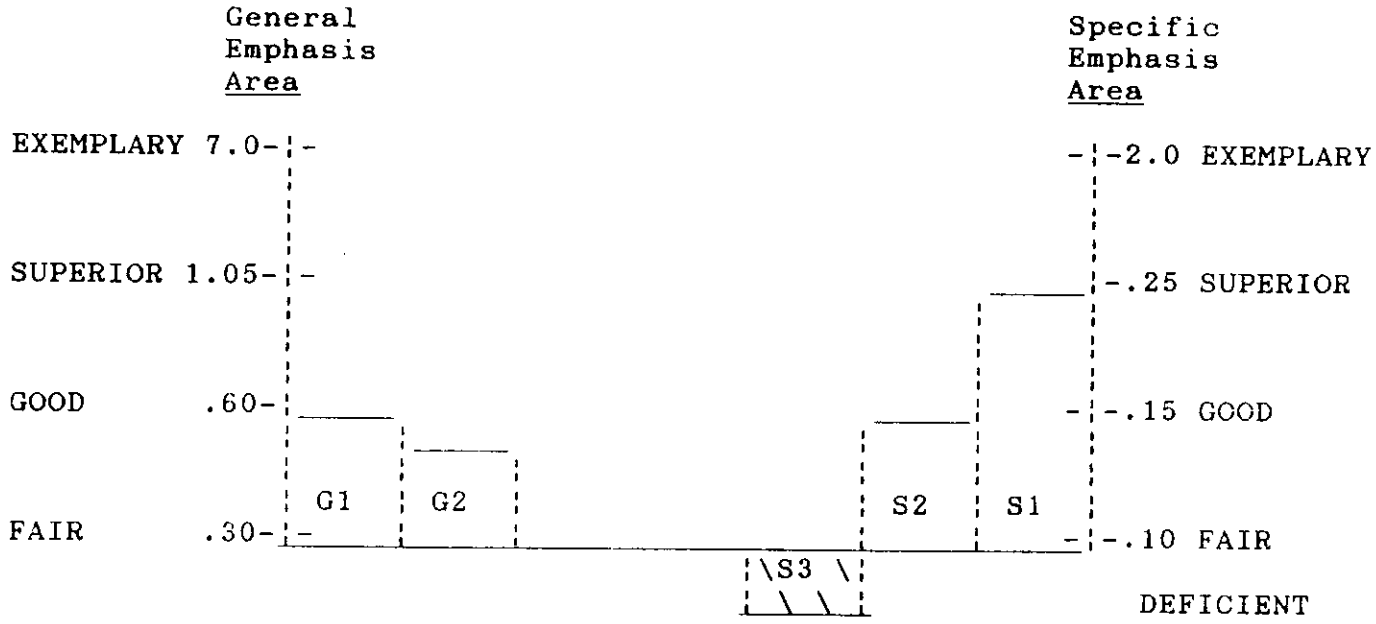
1. Mathematics
2. Music
3. Language Arts
4. Science



Charted as number of programs available

POSITIVE/NEGATIVE COLLECTION MAP

Emphasis Area Name	# of Items	Items/Student
G1. Folklore & fairytales	305	.51
G2. Animals	263	.44
S1. Indians of North America	150	.25
S2. Frontier & pioneer life	79	.13
S3. Dinosaurs	53	.09



APPENDIX 4

PHASE TWO

MAPPING THE COLLECTION IN DEPTH

1. Build a curricular topics master list.

2. Rank the curriculum topics list to decide what emphasis areas should be built to support the present and future curriculum. Have administrators and teachers help decide what emphasis area collections should be built in the library media center.

3. Re-check the current collection to see how much material is already owned in emphasis area collections.

4. Decide the fate of the emphasis collections. Have teachers and administrators help decide what should happen to the emphasis area collections over the next few years.

5. Re-map the collection to include the desired emphasis areas. Include the emphasis areas from the original collection map. This second map entitled "Proposed Collection Map" will contain the current strengths and the proposed collection strengths.

6. Create budget allocations for each emphasis collection from the new collection map in consultation with administrators and teachers.

File: Pot.emph.coll

POTENTIAL EMPHASIS COLLECTION LIST

Use the spreadsheet to enter curricular topics from curriculum guides or textbooks. In column D, indicate the month the unit is normally taught. In column E, priorities can be assigned, 1 being low and 5 being high.

Course Name	Unit Title	Grade	Month	Rank

File: Collect.chart

PROPOSED PURCHASE CHART

Part I.
(Enter your data in column L)

Date:
# of students: 0
# of items owned: 0
# of items to be purchased:
Proposed total collection: 0
Proposed items/student: ERROR

Part II. Emphasis Areas

(Under column F, first copy the area names you've identified in the previous section, then enter the new areas you want to build. If you indicate new areas in column F, supply # of items and # of students who use the areas in column H and J. Then in column N, enter B (to build), M (to maintain), or D (to de-emphasize) the area. Finally, in column P, enter how many items you plan to purchase.)

Area Name	# of Items	Students Who Use	Items/ Student	Goal B,M,D	Will Buy	Proposed Total	Pro. Items/ Student
A. General Emphasi							
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
B. Specific Emphas							
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR

PROPOSED PURCHASE CHART

Part I.
(Enter your data in column L)

Date:	
# of students:	+B9
# of items owned:	+B10
# of items to be purchased:	0
Proposed total collection:	+L9+L10
Proposed items/student:	+L11/L8

Part II. Emphasis Areas

(Under column F, first copy the area names you've identified in the previous section, then enter the new areas you want to build. If you indicate new areas in column F, supply # of items and # of students who use the areas in column H and J. Then in column N, enter B (to build), M (to maintain), or D (to de-emphasize) the area. Finally, in column P, enter how many items you plan to purchase.)

Area Name	# of Items	Students Who Use	Items/ Student
A. General			
	@IF(B29<>0,B29,@NA)	@IF(B13=1,L8,C29)	@IF(B13=1,H29/L8,H29/J29)
	@IF(B30<>0,B30,@NA)	@IF(B13=1,L8,C30)	@IF(B13=1,H30/L8,H30/J30)
	@IF(B31<>0,B31,@NA)	@IF(B13=1,L8,C31)	@IF(B13=1,H31/L8,H31/J31)
	@IF(B32<>0,B32,@NA)	@IF(B13=1,L8,C32)	@IF(B13=1,H32/L8,H32/J32)
	@IF(B33<>0,B33,@NA)	@IF(B13=1,L8,C33)	@IF(B13=1,H33/L8,H33/J33)
	@IF(B34<>0,B34,@NA)	@IF(B13=1,L8,C34)	@IF(B13=1,H34/L8,H34/J34)
	@IF(B35<>0,B35,@NA)	@IF(B13=1,L8,C35)	@IF(B13=1,H35/L8,H35/J35)
	@IF(B36<>0,B36,@NA)	@IF(B13=1,L8,C36)	@IF(B13=1,H36/L8,H36/J36)
	@IF(B37<>0,B37,@NA)	@IF(B13=1,L8,C37)	@IF(B13=1,H37/L8,H37/J37)
	@IF(B38<>0,B38,@NA)	@IF(B13=1,L8,C38)	@IF(B13=1,H38/L8,H38/J38)
B. Specifi			
	@IF(B40<>0,B40,@NA)	@IF(B13=1,L8,C40)	@IF(B13=1,H40/L8,H40/J40)
	@IF(B41<>0,B41,@NA)	@IF(B13=1,L8,C41)	@IF(B13=1,H41/L8,H41/J41)
	@IF(B42<>0,B42,@NA)	@IF(B13=1,L8,C42)	@IF(B13=1,H42/L8,H42/J42)
	@IF(B43<>0,B43,@NA)	@IF(B13=1,L8,C43)	@IF(B13=1,H43/L8,H43/J43)
	@IF(B44<>0,B44,@NA)	@IF(B13=1,L8,C44)	@IF(B13=1,H44/L8,H44/J44)
	@IF(B45<>0,B45,@NA)	@IF(B13=1,L8,C45)	@IF(B13=1,H45/L8,H45/J45)
	@IF(B46<>0,B46,@NA)	@IF(B13=1,L8,C46)	@IF(B13=1,H46/L8,H46/J46)
	@IF(B47<>0,B47,@NA)	@IF(B13=1,L8,C47)	@IF(B13=1,H47/L8,H47/J47)
	@IF(B48<>0,B48,@NA)	@IF(B13=1,L8,C48)	@IF(B13=1,H48/L8,H48/J48)
	@IF(B49<>0,B49,@NA)	@IF(B13=1,L8,C49)	@IF(B13=1,H49/L8,H49/J49)
	@IF(B50<>0,B50,@NA)	@IF(B13=1,L8,C50)	@IF(B13=1,H50/L8,H50/J50)
	@IF(B51<>0,B51,@NA)	@IF(B13=1,L8,C51)	@IF(B13=1,H51/L8,H51/J51)
	@IF(B52<>0,B52,@NA)	@IF(B13=1,L8,C52)	@IF(B13=1,H52/L8,H52/J52)
	@IF(B53<>0,B53,@NA)	@IF(B13=1,L8,C53)	@IF(B13=1,H53/L8,H53/J53)
	@IF(B54<>0,B54,@NA)	@IF(B13=1,L8,C54)	@IF(B13=1,H54/L8,H54/J54)

Goal B,M,D	Will Buy	Proposed Total	Pro.Items/ Student
		+H29+P29	@IF(B13=1,R29/L8,R29/J29)
		+H30+P30	@IF(B13=1,R30/L8,R30/J30)
		+H31+P31	@IF(B13=1,R31/L8,R31/J31)
		+H32+P32	@IF(B13=1,R32/L8,R32/J32)
		+H33+P33	@IF(B13=1,R33/L8,R33/J33)
		+H34+P34	@IF(B13=1,R34/L8,R34/J34)
		+H35+P35	@IF(B13=1,R35/L8,R35/J35)
		+H36+P36	@IF(B13=1,R36/L8,R36/J36)
		+H37+P37	@IF(B13=1,R37/L8,R37/J37)
		+H38+P38	@IF(B13=1,R38/L8,R38/J38)
		+H40+P40	@IF(B13=1,R40/L8,R40/J40)
		+H41+P41	@IF(B13=1,R41/L8,R41/J41)
		+H42+P42	@IF(B13=1,R42/L8,R42/J42)
		+H43+P43	@IF(B13=1,R43/L8,R43/J43)
		+H44+P44	@IF(B13=1,R44/L8,R44/J44)
		+H45+P45	@IF(B13=1,R45/L8,R45/J45)
		+H46+P46	@IF(B13=1,R46/L8,R46/J46)
		+H47+P47	@IF(B13=1,R47/L8,R47/J47)
		+H48+P48	@IF(B13=1,R48/L8,R48/J48)
		+H49+P49	@IF(B13=1,R49/L8,R49/J49)
		+H50+P50	@IF(B13=1,R50/L8,R50/J50)
		+H51+P51	@IF(B13=1,R51/L8,R51/J51)
		+H52+P52	@IF(B13=1,R52/L8,R52/J52)
		+H53+P53	@IF(B13=1,R53/L8,R53/J53)
		+H54+P54	@IF(B13=1,R54/L8,R54/J54)

File: Sam.col.chart.3

PROPOSED PURCHASE CHART

Part I.
(Enter your data in column L)

Date:	Sept.10, 1986
# of students:	597
# of items owned:	8289
# of items to be purchased:	597
Proposed total collection:	8886
Proposed items/student:	14.88

Part II. Emphasis Areas

(Under column F, first copy the area names you've identified in the previous section, then enter the new areas you want to build. If you indicate new areas in column F, supply # of items and # of students who use the areas in column H and J. Then in column N, enter B (to build), M (to maintain), or D (to de-emphasize) the area. Finally, in column P, enter how many items you plan to purchase.)

Area Name	# of Items	Students Who Use	Items/ Student	Goal B,M,D	Will Buy	Proposed Total	Pro.Items/ Student
A. General Emphasi							
G1. Folklore & fa	305	597	.51	D	0	305	.51
G2. Animals	263	597	.44	M	10	273	.46
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
B. Specific Emphas							
S1. Indians of Nor	150	597	.25	M	10	160	.27
S2. Frontier & pio	79	597	.13	B	50	129	.22
S3. Dinosaurs	53	597	.09	M	10	63	.11
S4. Culture	24	597	.04	B	40	64	.11
S5. China	8	597	.01	B	30	38	.06
S6. Japan	13	597	.02	B	30	43	.07
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR
	NA	597	ERROR			NA	ERROR

File: Sam.col.chart.c

PROPOSED PURCHASE CHART

Part I.
(Enter your data in column L)

Date:	Sept.10, 1986
# of students:	597
# of items owned:	8289
# of items to be purchased:	597
Proposed total collection:	8886
Proposed items/student:	14.88

Part II. Emphasis Areas

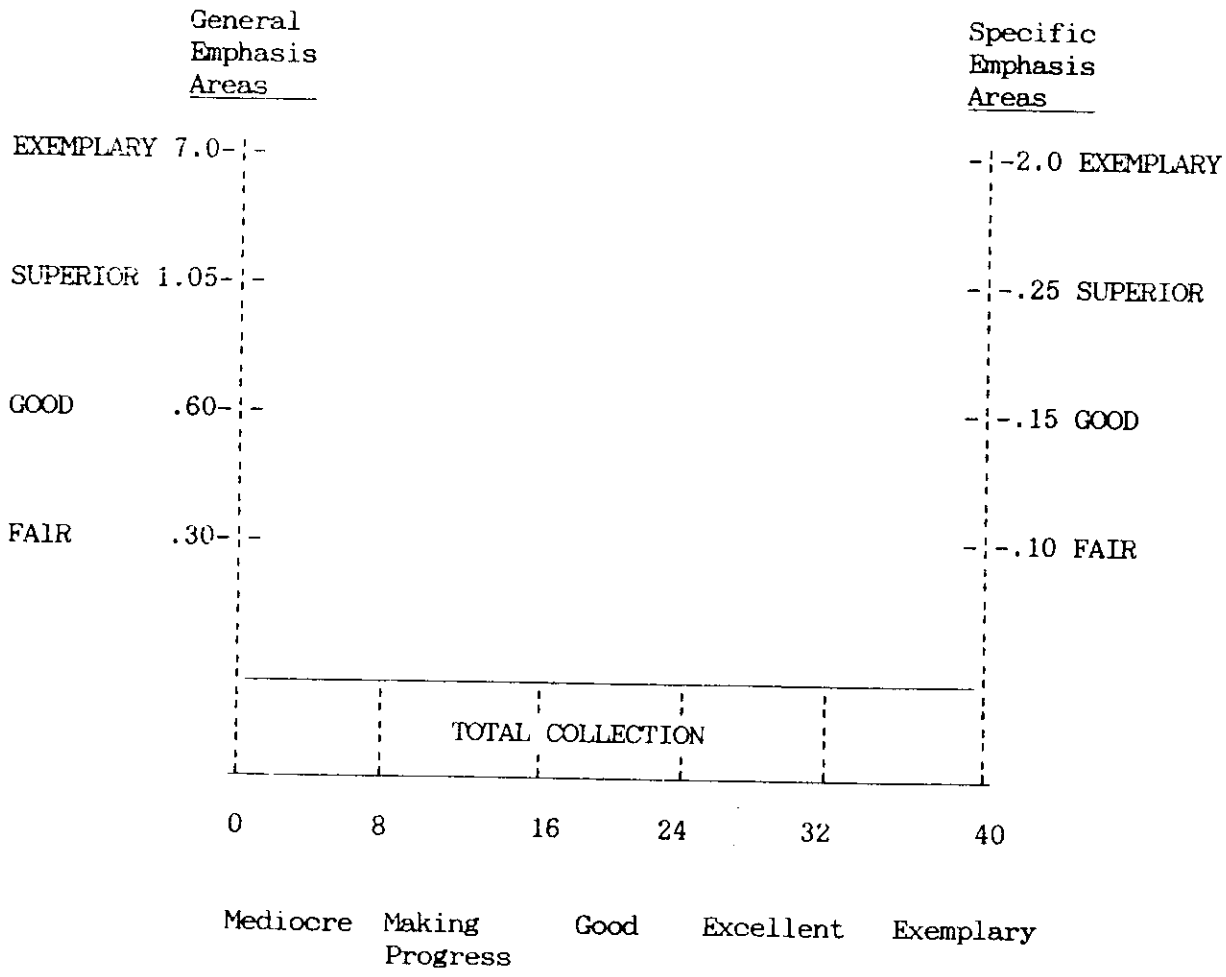
(Under column F, first copy the area names you've identified in the previous section, then enter the new areas you want to build. If you indicate new areas in column F, supply # of items and # of students who use the areas in column H and J. Then in column N, enter B (to build), M (to maintain), or D (to de-emphasize) the area. Finally, in column P, enter how many items you plan to purchase.)

Area Name	# of Items	Students Who Use	Items/ Student	Goal B,M,D	Will Buy	Proposed Total	Pro.Items/ Student
A. General Emphasi							
G1. Folklore & fa	305	350	.87	D	0	305	.87
G2. Animals	263	597	.44	M	10	273	.46
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
B. Specific Emphas							
S1. Indians of No	150	80	1.88	M	10	160	2.00
S2. Frontier & pi	79	60	1.32	B	50	129	2.15
S3. Dinosaurs	53	60	.88	M	10	63	1.05
S4. Culture	24	50	.48	B	40	64	1.28
S5. China	8	25	.32	B	30	38	1.52
S6. Japan	13	25	.52	B	30	43	1.72
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR
	NA	NA	ERROR			NA	ERROR

PROPOSED COLLECTION MAP

Date:
School Name:
No. of Students:
Total Collection Size (Items/Student):
Proposed Total Collection Size (Proposed Items/Student):

Emphasis Area Name	# of Items Owned *	Proposed # of Items **	Decision

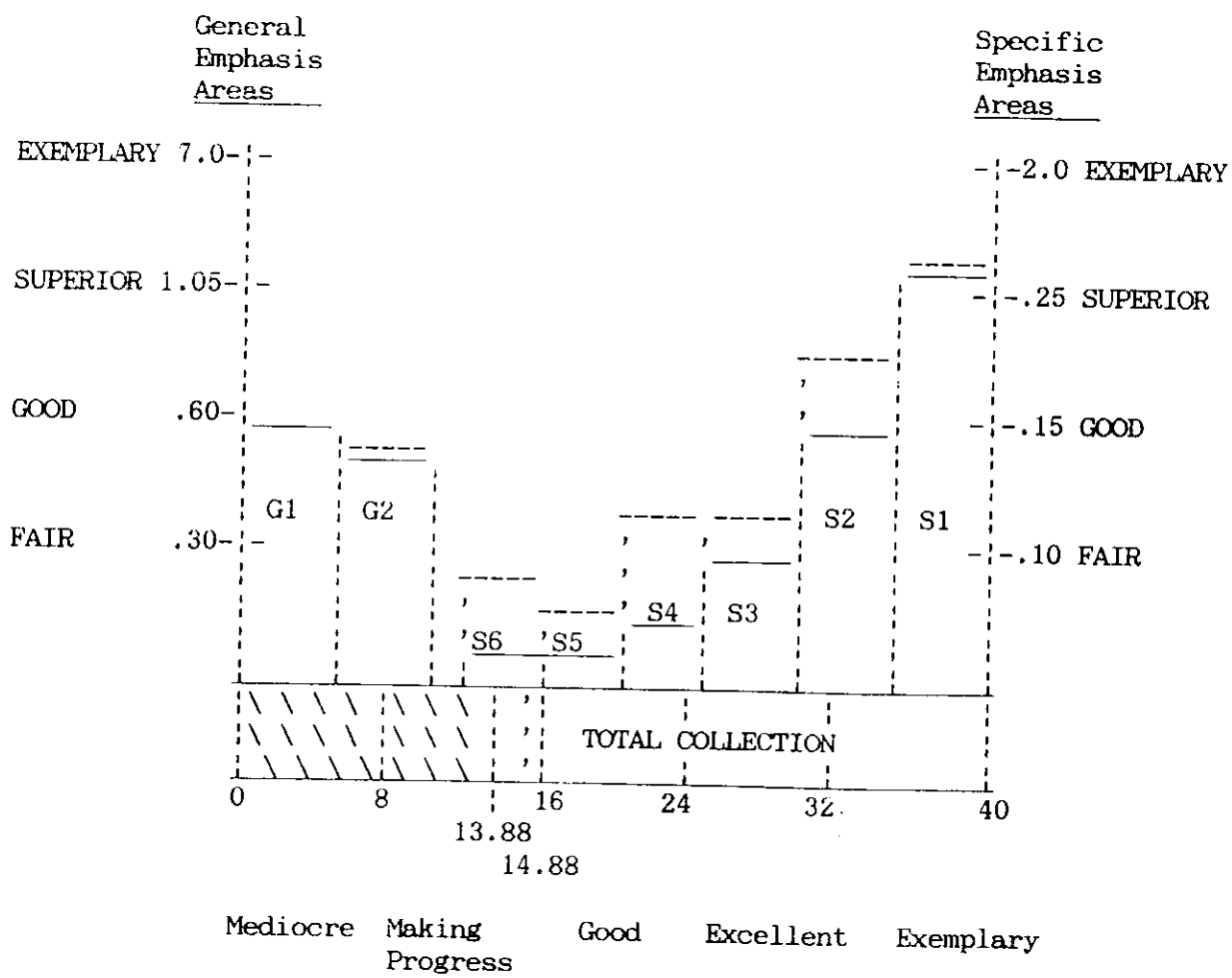


Note: * Figures in parentheses indicate # of items owned/student.
** Figures in parentheses indicate proposed # of items/student.

SAMPLE ELEMENTARY SCHOOL
PROPOSED COLLECTION MAP

Date: Sept. 10, 1986
School Name: Washington
No. of Students: 597
Total Collection Size (Items/Student): 8,289 (13.88)
Proposed Total Collection Size (Proposed Items/Student): 8,866 (14.88)

Emphasis Area Name	# of Items Owned*	Proposed # of Items**	Decision
G1. Folklore & fairytales	305 (.51)	305 (.51)	De-emphasize
G2. Animals	263 (.44)	273 (.46)	Maintain
S1. Indians of North America	150 (.25)	160 (.27)	Maintain
S2. Frontier & pioneer life	79 (.13)	129 (.22)	Build
S3. Dinosaurs	53 (.09)	63 (.11)	Maintain
S4. Culture	24 (.04)	64 (.11)	Build
S5. China	8 (.01)	38 (.06)	Build
S6. Japan	13 (.02)	43 (.07)	Build



Note: * Figures in parentheses indicate # of items owned/student.
** Figures in parentheses indicate proposed # of items/student.

File: Sample.budget

Income leger for the fiscal year...
Source of funds by category

	Books	AV	Software	Periodicals	Supplies	Equipment	Repairs
District funds	$2,500.00	$1,500.00	$700.00	$980.00	$350.00	$1,200.00	$700.00
Chapter II			$750.00			$3,500.00	
PTA	$150.00		$150.00				
Total income	$2,650.00	$1,500.00	$1,600.00	$980.00	$350.00	$4,700.00	$700.00

Expenditure leger by month

Month	To Whom	Fund Source	Books	AV	Software	Periodicals	Supplies	Equipment	Repair
Aug.	Brodart	district	$432.00						
Aug.	Highsmith	district					$56.00		
Aug.	MECC	PTA			$120.00				
Aug.	EBSCO	district				$279.00			
Aug.									
Aug.									
Total			$432.00	$0.00	$120.00	$279.00	$56.00	$0.00	$0.00
Balance			$2,218.00	$1,500.00	$1,480.00	$701.00	$294.00	$4,700.00	$700.00

Month	To Whom	Fund Source	Books	AV	Software	Periodicals	Supplies	Equipment	Repair
Sept.	EBSCO	district				$130.00			
Sept.	Brodart	district	$200.00						
Sept.	Kodak	district						$699.00	
Sept.	Nat.Geography	district		$174.50					
Sept.	Brodart	district	$356.90						
Sept.	University	district					$239.00		
Total			$556.90	$174.50	$0.00	$130.00	$239.00	$699.00	$0.00
Balance			$1,661.10	$1,325.50	$1,480.00	$571.00	$55.00	$4,001.00	$700.00

File: Sample.emph.bud

EMPHASIS AREA BUDGET REPORT

In the columns below, list the amounts of money which are spent on each of the collection. Enter area names on the Area row. This spreadsheet allows you to enter 10 areas. Enter yearly budget allocation for each area on the ALLOCATION row. Formulas keeping the balance on each month will have to be checked for accuracy. If you need more rows for a particular month, insert them.

AREA	BASIC COLL.	FOLKLORE	ANIMALS	INDIANS	FRONTIER	DINOSAURS	CULTURE	CHINA	JAPAN	OUTSTAND.	ANNUAL
ALLOCATION	$3,000.00	$0.00	$150.00	$150.00	$750.00	$150.00	$600.00	$450.00	$450.00	$250.00	$275.00
Month											
Aug.	$200.00		$32.00				$57.00				
Aug.	$160.00			$45.00	$25.00			$150.00	$35.00		
Aug.											
Aug.			$10.00		$19.95	$25.85	$15.00				
Aug.											
Total	$360.00	$0.00	$42.00	$45.00	$44.95	$25.85	$72.00	$150.00	$35.00	$0.00	$0.00
Balance	$2,640.00	$0.00	$108.00	$105.00	$705.05	$124.15	$528.00	$300.00	$415.00	$250.00	$275.00
Month											
Sept.	$175.00					$12.00	$35.00				
Sept.								$22.00	$95.00		
Sept.	$100.00				$136.00						
Sept.											
Sept.											
Total	$275.00	$0.00	$0.00	$0.00	$136.00	$12.00	$35.00	$22.00	$95.00	$0.00	$0.00
Balance	$2,365.00	$0.00	$108.00	$105.00	$569.05	$112.15	$493.00	$278.00	$320.00	$250.00	$275.00

APPENDIX 5

PHASE THREE

THE COMPUTERIZED ACQUISITION SYSTEM

1. Analyze the types of the materials to purchase for each emphasis collection.

2. Prepare a spreadsheet to match the emphasis areas.

3. Select materials from reviews, bibliographies, previews, etc.

4. Create an acquisition file which will also serve as the on-order file and the received file.

5. Use the power of the database to make purchase decisions and create purchase orders from the acquisition file.

6. Record received items in the computer file and decide the disposition of items not received.

7. Enter revised budgetary information into the spreadsheet.

8. Create new materials announcements from the computerized file.

9. Create a New Collection Map. This map becomes next year's current map.

Types of Materials

This file is a sample of a list which might be made by a teacher and a library media specialist as they consult on what types of materials to purchase for an emphasis collection. Note that the types of materials listed are just not generic media. Just to say that we need books, films, filmstrips or charts does not help at all. Specific types of media with usage indicated are far more valuable as a prelude to the selection process.

Language Arts

Composition and Creative Writing
- Raw data for technical analysis and writing
- Samples of good writing
- Motivational material
- Drill and practice computer software
- Word processors, spelling and grammar checkers
- Thoughtware program for the computer

French Authors
- Reference books identifying French authors with short biographies
- Check holdings by French authors - span authors? duplicates of most popular works?
- Criticisms of French authors - check all those studied - Have enough duplicates?
- Overviews of French literature
- Picture sources of authors for bulletin boards
- Synopses of works - written and video

Science

Insects
- Identification books of local insects
- Pictures - line drawings for use in graphic production
- Computer simulations of pesticides and insects
- Realia - insect collections (local vs. exotic)

Life in a Pond
- Charts of pond life
- Realia - dried weeds, taxidermy of fish/frogs, etc., water analysis test kit.
- Slide set of animals/life found in a pond
- Videotape which explores the common animals and plants
- Identification books for graphic drawings

Fish (in the wild and as pets)
- Books on care and identification
- Study prints on exotic fish
- Film or video about setting up an acquarium
- Is there a periodical besides Nat. Geog. on the topic?
- Resource file - need fish shop directory, fish hatchery employees, hatchery information for visits, bait shop owners.
- Realia - examples of scales, skeletons, taxidermy examples

Dinosaurs
- Models
- Captioned filmstrips
- Coloring books
- Identification books
- Films on discoveries and digs
- Actual fossils
- Fictional stories - easy reading
- Time line charts

Non-fiction - easy reading
Computer software which would drill names

Social Studies

Frontier Life
- Historical accounts - originals, not interpretations
- Biographies of common people
- Pictures - look for commoners - not famous scenes
- Music - folk music, not major composers
- Computer simulations - on beyond Oregon Trail

Russia
- Original sources - in Russian (a few samples)
- Pictures - current life style
- Atlases - historical plus post WWII
- Culture - current and traditional music and art
- Historical novels - various reading levels
- Biographies - various reading levels
- Newest political material
- Time lines
- Russian leaders - fact sources - current

Minnesota History
- Settlement maps
- Immigration patterns materials
- Overview filmstrips
- Paintings by local artist on historical or cultural themes
- Military history - particularly sources on forts
- Diaries
- Jackdaws, if available
- Uniforms for graphics production
- Music - samples of various cultural groups
- Historical novels
- Biographies of both the famous and un-famous
- Census forms and census microfilm for local county
- Oral history tapes
- Historical society packaged units
- Minnesota trivia game

Philosophy and Philosophers
- Biographies of philosophers - reasonable length - not exhaustive
- Reference books covering theories and phiosophers - look for good capsule summaries.
- Critical sources about the philosophical movements
- Videos on famous philosophers
- Works - most famous represented in collection? Those with critical and biographical notes to be preferred.

This file contains the decisions made by teachers and library media specialists for building emphasis collections in the Sample School.

Animals
- Models
- Fictional stories - Easy reading
- Time-line charts

China
- Picture sources
- Painting and calligraphy

Culture
- Friendship - Fiction
- Fact sources
- Picture sources
- Customs
- Way of life
- Food - Cookbooks
- Art
- Music

Dinosaur
- Coloring books
- Identification books

Frontier and pioneer life
- Historical accounts
- Folk music

Indians of North America
- Original source materials
- Folktales

Japan
- Filmstrips covering high technology
- How-to books on paper folding
- Japaneses folklore

The Frog Princess. Retold by Elizabeth Isele. Illustrated by Michael Hague. Crowell. 32 pp. $10.89. ISBN 0-690-04218-3.* (P). This Russian folktale, illustrated in Hague's now-familiar style, describes how Ivan, the youngest son of the Czar, is forced to marry an ugly frog. Ivan, astounded to learn the frog is really a beautiful princess, must experience trials and tribulations in his search to reclaim her. Patience reigns as a virtue. JB

The Hungry Woman: Myths and Legends of the Aztecs. Edited by John Bierhorst. Illustrated with drawings. Morrow. 160 pp. $9.50. ISBN 0-688-02766-0. (A). This remarkable collection of Aztec folktales was recorded in the 16th century. The creation myths, stories of the founding of Mexico and of the coming of Cortes are illustrated with ancient Aztec drawings. Together, words and pictures show the pride and passion, the savagery and sadness of a once-great people. A pronunciation key, a guide to special terms, endnotes and a reference section of mainly Mexican sources conclude the text. SMW

Meet the Witches. Georgess McHargue. Illustrated with photographs and drawings. Lippincott. 128 pp. $10.89. ISBN 0-397-32072-8.* (I & A). Who are the real witches? Through careful research and colorful descriptions, McHargue brings them back alive: the classical enchantresses, witches of folk and fairy tale, victims of 16th century witch hunts and practitioners of modern witchcraft. This high interest informational book reflects a strong sense of history. Index. Part of the publisher's The Eerie Series. SMW

Monkey and the White Bone Demon. Adapted by Zhang Xiu Shi; translated from the Chinese by Ye Ping Kuei and revised by Jill Morris. Illustrated by Lin Zheng at al. Viking. 36 pp. $10.95. ISBN 0-670-48574-8. (I & A). The stunning illustrations by contemporary Chinese artists leap from the pages of this adaptation for children of an episode from a 16th century Chinese novel. In a quest for ancient Buddhist scriptures, Monkey helps his companions, a monk, Pigsy and Sandy, escape capture by the White Bone Demon. There are familiar traditional folklore themes of quest, entrapment, escape and the triumph of good over evil. The visual substance should be useful in any study of China. It is of some interest that the work, adapted from the novel *The Pilgrimage to the West* by Wu Cheng En, was published in association with Liaoning Fine Arts Publishing House, China. JC

The Mysterious Giant of Barletta. Retold by Tomie dePaola. Illustrated by the reteller. HBJ. 32 pp. $12.95. ISBN 0-15-256347-4. (P & I). Everyone in Barletta loved the giant—a statue, of course—that stood in the church square. When the town is threatened by an invading army, the townspeople depend on the giant to be their champion. The clever giant does not disappoint them and with a simple trick, the town is saved. A charming adaptation of an Italian legend enlivened with magnificent bold full-color illustrations to delight those who believe in giants and such. JLS

Illustration copyright © 1984 by Mark Brown from *Oh, Kojo! How Could You!* retold by Verna Aardema. Used by permission of Dial Books for Young Readers

Oh, Kojo! How Could You! Retold by Verna Aardema. Illustrated by Mark Brown. Dial. 32 pp. $10.89. ISBN 0-8037-00075-5.* (P & I). This wonderfully amusing Ashanti folktale offers humor, magic, adventure and mischief. Ananse is up to his usual tricks. This time his victim is Kojo, a magic child. In the end, of course, Kojo wins with the help of the cat that is ever after welcome in Ashanti homes. The author's style and her use of onomatopoeia are just right. The stylish, peppy, colorful paintings were influenced by West African cave paintings. JC

Spirit Child: A Story of the Nativity. Retold by John Bierhorst; translated from the Aztec by the reteller. Illustrated by Barbara Cooney. Morrow. 32 pp. $11.04. ISBN 0-688-02610-9.* (P, I & A). This exceptional book combines Barbara Cooney's magnificent illustrations with a carefully researched native American interpretation of Jesus' birth, translated by John Bierhorst from the Aztec text *Psalmodia Christiana* (1583). JSW

The Story Vine: A Source Book of Unusual and Easy-to-Tell Stories From Around the World. Anne Pellowski. Illustrated by Lynn Sweat. Macmillan. 128 pp. $14.95. ISBN 0-02-770590-0. Paper ed., Macmillan. $7.95. ISBN 0-02-044690-X. (P, I & A). This source book contains "unusual and easy-to-tell stories from around the world." Many of the stories involve the audience with string figures, musical instruments and finger play. The book includes diagrams to aid visual presentation, bibliographies for the stories included, suggestions for storytellers and further reading selections. It may be used as a read-aloud book with younger children and independently by older readers. JSW

The Town Mouse and the Country Mouse. Retold by Lorinda Bryan Cauley. Illustrated by the reteller. Putnam. 32 pp. $11.95. ISBN 0-399-21123-3. Paper ed., Putnam. $4.95. ISBN 0-399-21126-8. (P). An old favorite newly and beautifully presented. When a town mouse and a country mouse exchange visits, they come to realize how different living styles match different needs and preferences. Illustrations and descriptions project settings of the wholesome countryside and the luxurious surroundings of a Victorian home. JB

CATEGORY NAMES IN THE ACQUISITION FILE

1. AUTHOR
2. TITLE
3. PUBLISHER
4. YEAR
5. ISBN#
6. COPIES
7. COST
8. REVIEW SOURCE
9. TYPE OF MEDIA
10. TOPIC OR TYPE
11. PRIORITY
12. REQUEST BY
13. ON ORDER DATE
14. RECEIVED?

Emphasis Collection

File: Samp.acq.file.1
Report: APR 86
Selection: Emphasis Area equals CHINA
or Emphasis Area equals JAPAN
or Emphasis Area equals CULTURE

Author	Title	Copies	Cost	Emphasis	Priority	Total
Wallace, Ian	Chin Chiang	1	9.95	China	5	9.95
	China	1	35	China	5	35.00
Lawson, Don	Eagle and th	1	11.95	China	5	11.95
Zhang Xiu Sh	Monkey and t	1	10.95	China	5	10.95
Jingxiu, Sun	We live in C	2	9.90	China	5	19.80
Lord, Bette	In the year	1	9.89	China	2	9.89
						97.54
Meltzer	Black Americ	1	12.89	Culture	5	12.89
Davidson, Ma	History of a	1	9.99	Culture	5	9.99
	Rivers and a	1	39.95	Culture	4	39.95
						62.83
Friedman, In	How my paren	2	12.95	Japan	5	25.90
Klass, David	Atami dragon	1	12.95	Japan	4	12.95
Haugaard, Er	Samurai's ta	1	12.95	Japan	2	12.95
						51.80
						212.17*

File: Sample.PO
Report: April.order

Author	Title	Publishe	Year	ISBN#	Cop	Cost	Total
Wallace,	Chin Chiang and the dragon's	Atheneum	1984	0-689-50299-0	1	9.95	9.95
	China	prod. Vi	1985		1	35	35.00
Lawson, D	Eagle and the dragon: the his	Crowell	1985	0-690-04486-0	1	11.95	11.95
Zhang Xiu	Monkey and the white bone dem	Viking	1984	0-670-48574-8	1	10.95	10.95
Jingxiu,	We live in China	Bookwrig	1984	0-531-04779-2	2	9.90	19.80
Meltzer	Black Americans: a history in	Crowell	1984	0-069-04418-6	1	12.89	12.89
Davidson,	History of art from 25,000 B.	Random	1984	0-394-95181-6	1	9.99	9.99
Friedman,	How my parents learned to eat	Houghton	1984	0-395-35379-3	2	12.95	25.90
							136.43*

Author: Wallace, Ian
Title: Chin Chiang and the dragon's dance
Publisher: Atheneum
Year: 1984
ISBN#: 0-689-50299-0
Copies: 1
Cost: 9.95

Author:
Title: China
Publisher: prod. Virginia Noir, dist. Kimberly Wick
Year: 1985
ISBN#:
Copies: 1
Cost: 35

Author: Lawson, Don
Title: Eagle and the dragon: the history of U.S.-China relations
Publisher: Crowell
Year: 1985
ISBN#: 0-690-04486-0
Copies: 1
Cost: 11.95

Author: Zhang Xiu Shi
Title: Monkey and the white bone demon
Publisher: Viking
Year: 1984
ISBN#: 0-670-48574-8
Copies: 1
Cost: 10.95

Author: Jingxiu, Sun et al.
Title: We live in China
Publisher: Bookwright/Watts
Year: 1984
ISBN#: 0-531-04779-2
Copies: 2
Cost: 9.90

Author: Meltzer
Title: Black Americans: a history in their own words
Publisher: Crowell
Year: 1984
ISBN#: 0-069-04418-6
Copies: 1
Cost: 12.89

Author: Davidson, Marshall B.
Title: History of art from 25,000 B.C. to the present
Publisher: Random
Year: 1984
ISBN#: 0-394-95181-6
Copies: 1
Cost: 9.99

Author: Friedman, Ina R.
Title: How my parents learned to eat
Publisher: Houghton
Year: 1984
ISBN#: 0-395-35379-3
Copies: 2
Cost: 12.95

File: Samp.acq.file.3
Report: New.materials
Selection: On order date equals Apr 86
and Received? equals Y

Author	Title	Publishe	Year	Emphasis	Requeste	On order	Rec
Wallace, Ian	Chin Chiang and the dragon's	Atheneum	1984	China	Ho	Apr 86	Y
	China	prod. Vi	1985	China	Ho	Apr 86	Y
Lawson, Don	Eagle and the dragon: the his	Crowell	1985	China	Ho	Apr 86	Y
Zhang Xiu Sh	Monkey and the white bone dem	Viking	1984	China	Sullivan	Apr 86	Y
Jingxiu, Sun	We live in China	Bookwrig	1984	China	Thompson	Apr 86	Y
Meltzer	Black Americans: a history in	Crowell	1984	Culture	Ho	Apr 86	Y
Davidson, Ma	History of art from 25,000 B.	Random	1984	Culture	Ho	Apr 86	Y
Friedman, In	How my parents learned to eat	Houghton	1984	Japan	Turner	Apr 86	Y

File: Collect.chart

NEW COLLECTION CHART

Part I.
(Enter your data in column Y)

Date:
# of Students:
# of Items Originally Owned: 0
# of Items Purchased This Year:
# of Items Discarded This Year:
New Total Collection Size: 0
New Items/Student: ERROR

Part II. Emphasis Areas
(Under column V, copy emphasis area names from the previous section. Enter number of items added and weeded in column X and Y. If you choose to map your collection by number of students who use the area, enter the number in column AA.)

Area Name	# Owned	# Added	# Weeded	Total	Students Who Use	New Items/ Student
A. General Emphasis						
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
B. Specific Emphasis						
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR

NEW COLLECTION CHART

Part I.
(Enter your data in column Y)

Date:
# of Students:
# of Items Originally Owned: +L9
# of Items Purchased This Year:
# of Items Discarded This Year:
New Total Collection Size: +Y9+Y10-Y11
New Items/Student: +Y12/Y8

Part II. Emphasis Areas

(Under column V, copy emphasis area names from the previous section. Enter number of items added and weeded in column X and Y. If you choose to map your collection by number of students who use the area, enter the number in column AA.)

Area Name	# Owned	# Added	# Weeded	Total
A. General Emphasis Area				
	+H29			+W29+X29-Y29
	+H30			+W30+X30-Y30
	+H31			+W31+X31-Y31
	+H32			+W32+X32-Y32
	+H33			+W33+X33-Y33
	+H34			+W34+X34-Y34
	+H35			+W35+X35-Y35
	+H36			+W36+X36-Y36
	+H37			+W37+X37-Y37
	+H38			+W38+X38-Y38
B. Specific Emphasis Area				
	+H40			+W40+X40-Y40
	+H41			+W41+X41-Y41
	+H42			+W42+X42-Y42
	+H43			+W43+X43-Y43
	+H44			+W44+X44-Y44
	+H45			+W45+X45-Y45
	+H46			+W46+X46-Y46
	+H47			+W47+X47-Y47
	+H48			+W48+X48-Y48
	+H49			+W49+X49-Y49
	+H50			+W50+X50-Y50
	+H51			+W51+X51-Y51
	+H52			+W52+X52-Y52
	+H53			+W53+X53-Y53
	+H54			+W54+X54-Y54

Students Who Use	Items/ Student
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z29/Y8,Z29/AA29)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z30/Y8,Z30/AA30)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z31/Y8,Z31/AA31)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z32/Y8,Z32/AA32)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z33/Y8,Z33/AA33)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z34/Y8,Z34/AA34)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z35/Y8,Z35/AA35)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z36/Y8,Z36/AA36)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z37/Y8,Z37/AA37)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z38/Y8,Z38/AA38)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z40/Y8,Z40/AA40)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z41/Y8,Z41/AA41)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z42/Y8,Z42/AA42)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z43/Y8,Z43/AA43)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z44/Y8,Z44/AA44)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z45/Y8,Z45/AA45)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z46/Y8,Z46/AA46)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z47/Y8,Z47/AA47)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z48/Y8,Z48/AA48)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z49/Y8,Z49/AA49)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z50/Y8,Z50/AA50)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z51/Y8,Z51/AA51)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z52/Y8,Z52/AA52)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z53/Y8,Z53/AA53)
@IF(B13=1,Y8,@NA)	@IF(B13=1,Z54/Y8,Z54/AA54)

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NEW COLLECTION CHART

Part I.
(Enter your data in column Y)

Date:	May 25, 1987
# of Students:	600
# of Items Originally Owned:	8289
# of Items Purchased This Year:	400
# of Items Discarded This Year:	35
New Total Collection Size:	8654
New Items/Student:	14.42

Part II. Emphasis Areas
(Under column V, copy emphasis area names from the previous section. Enter number of items added and weeded in column X and Y. If you choose to map your collection by number of students who use the area, enter the number in column AA.)

Area Name	# Owned	# Added	# Weeded	Total	Students Who Use	New Items/ Student
A. General Emphasis						
G1. Folklore & fair	305	0	5	300	600	.50
G2. Animals	263	10	2	271	600	.45
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
B. Specific Emphasis						
S1. Indians of North	150	10	1	159	600	.27
S2. Frontier & pione	79	25	0	104	600	.17
S3. Dinosaurs	53	10	2	61	600	.10
S4. Culture	24	60	0	84	600	.14
S5. China	8	20	0	28	600	.05
S6. Japan	13	15	0	28	600	.05
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR
	NA			NA	600	ERROR

File: Sam.col.chart.c

NEW COLLECTION CHART

Part I.
(Enter your data in column Y)

Date:	May 25, 1987
# of Students:	600
# of Items Originally Owned:	8289
# of Items Purchased This Year:	400
# of Items Discarded This Year:	35
New Total Collection Size:	8654
New Items/Student:	14.42

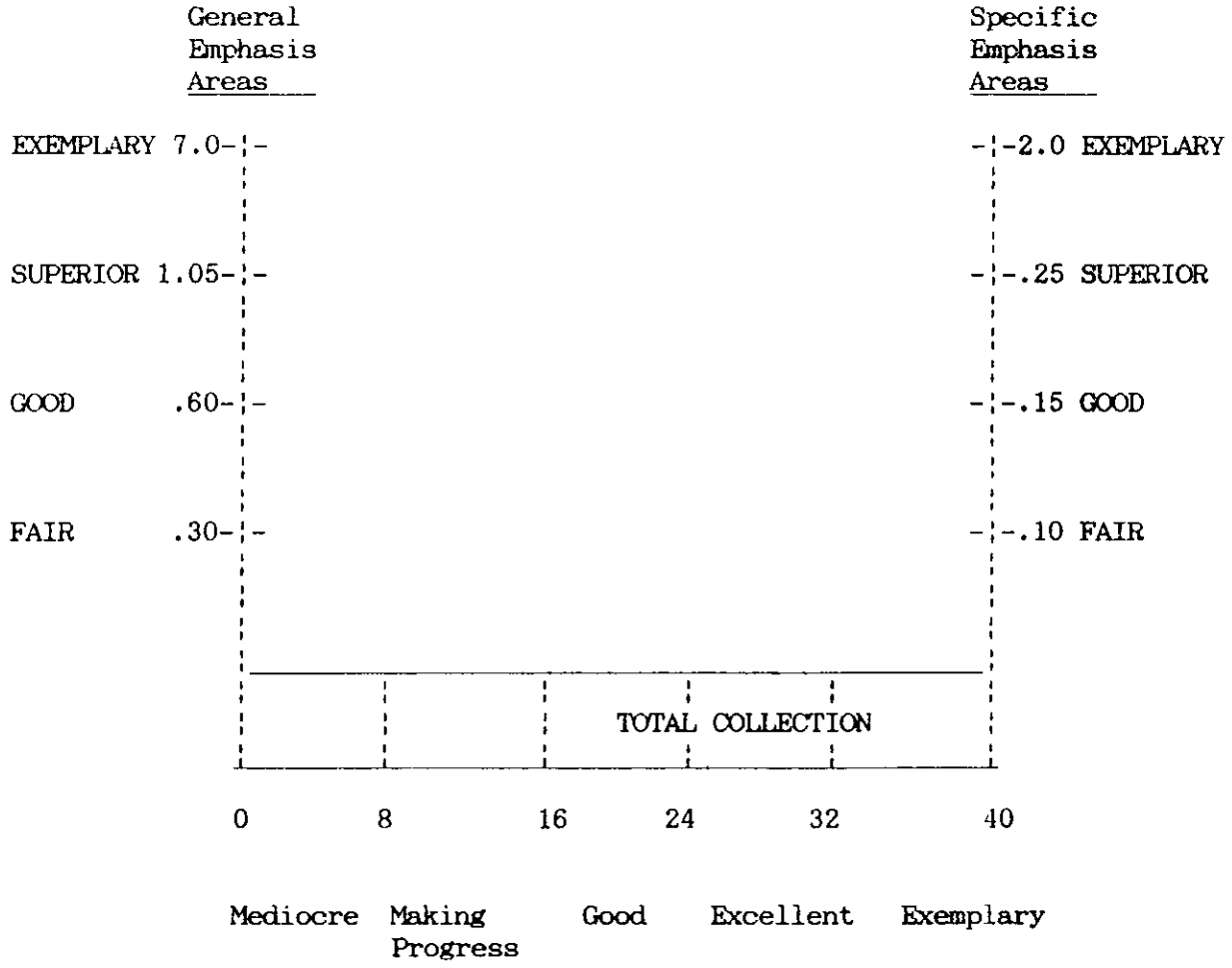
Part II. Emphasis Areas
(Under column V, copy emphasis area names from the previous section. Enter number of items added and weeded in column X and Y. If you choose to map your collection by number of students who use the area, enter the number in column AA.)

Area Name	# Owned	# Added	# Weeded	Total	Students Who Use	New Items/ Student
A. General Emphasis						
G1. Folklore & fair	305	0	5	300	365	.82
G2. Animals	263	10	2	271	500	.54
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
B. Specific Emphasis						
S1. Indians of Nort	150	10	1	159	90	1.77
S2. Frontier & pion	79	25	0	104	70	1.49
S3. Dinosaurs	53	10	2	61	75	.81
S4. Culture	24	60	0	84	80	1.05
S5. China	8	20	0	28	50	.56
S6. Japan	13	15	0	28	50	.56
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR
	NA			NA	NA	ERROR

NEW COLLECTION MAP

Date:
School Name:
No. of Students:
Old Total Collection Size (Items/Student):
New Total Collection Size (New Items/Student):

Emphasis Area Name	Old # of Items*	New # of Items**	Decision

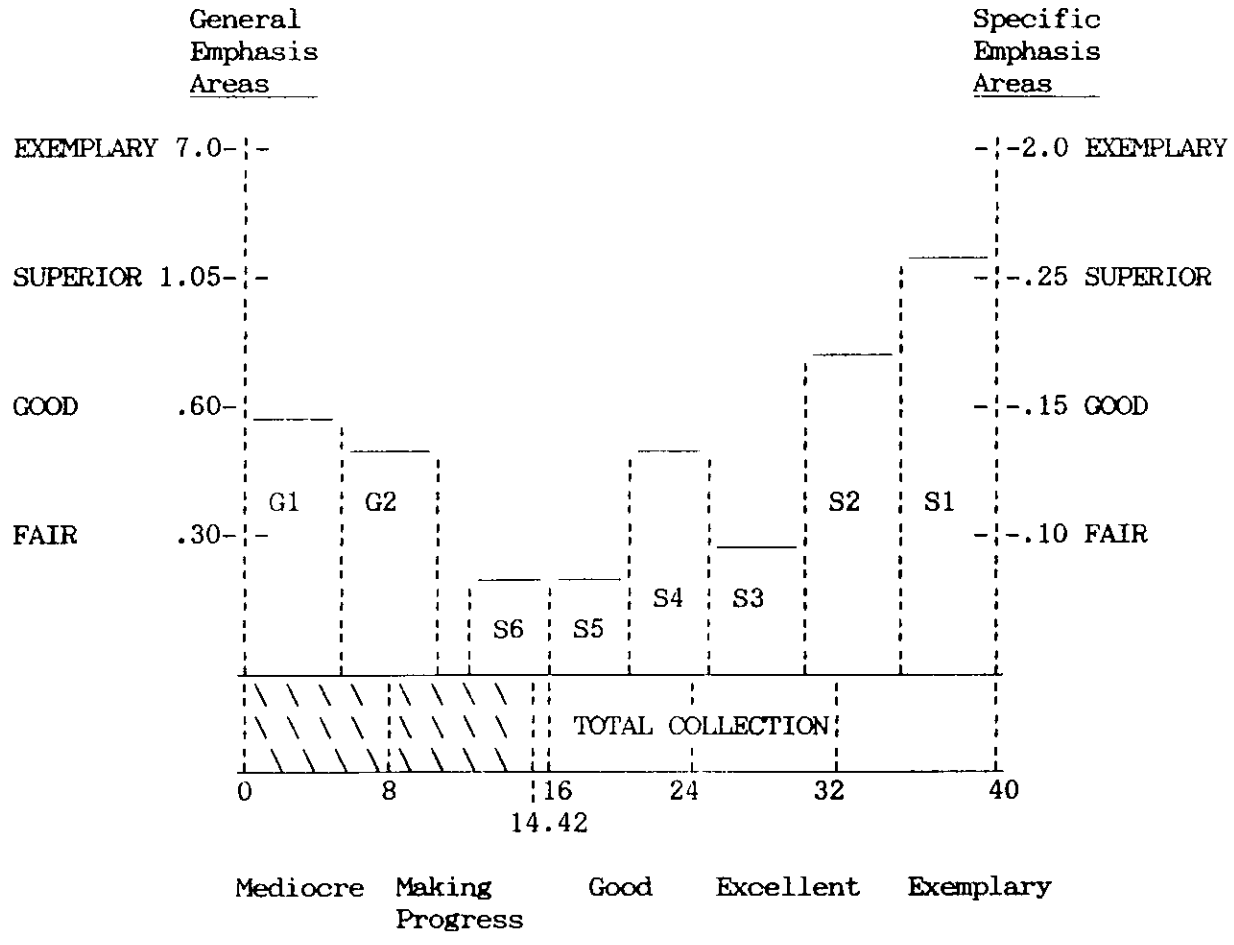


Note: * Figures in parentheses indicate old # of items/student.
** Figures in parentheses indicate new # of items/student.

SAMPLE ELEMENTARY SCHOOL
NEW COLLECTION MAP

Date: May 25,1987
School Name: Washington
No. of Students: 600
Old Total Collection Size (Items/Student): 8,289 (13.88)
New Total Collection Size (New Items/Student): 8,654 (14.42)

Emphasis Area Name	Old # of Items*	New # of Items**	Decision
G1. Folklore & fairytales	305 (.51)	300 (.50)	De-emphasize
G2. Animals	263 (.44)	271 (.45)	Maintain
S1. Indians of North America	150 (.25)	159 (.27)	Maintain
S2. Frontier & pioneer life	79 (.13)	104 (.17)	Build
S3. Dinosaurs	53 (.09)	61 (.10)	Maintain
S4. Culture	24 (.04)	84 (.14)	Build
S5. China	8 (.01)	28 (.05)	Build
S6. Japan	13 (.02)	28 (.05)	Build



Note: * Figures in parentheses indicate old # of items/student.
** Figures in parentheses indicate new # of items/student.

APPENDIX 6

PHASE FOUR

COLLECTION EVALUATION

1. Evidence that the collection of the library media center supports the curriculum of the school.

2. Documentation that a plan to build a curricular-oriented collection with the accompanying policies, staff expertise and realistic budgeting practices is in place.

3. Demonstration that an acquisition system which matches curricular priorities is in place.

4. Evidence that each type of media included in the library media center is considered as a system and is supported properly.

5. Confirmation that the library media collection is only one node in a network of collections which service the school.

6. Verification that the library media collection reflects democratic ideals, intellectual freedom and cultural diversity.

7. Easy-to-understand evidence of what is being spent on library media collections, how the money is being spent, what difference it is making and what should happen to the collection in the future.

ASSESSMENT OF THE LIBRARY MEDIA COLLECTION'S RESPONCE TO CURRICULAR DEMANDS

Directions: Together, library media specialists, teachers and students should answer the following items:

Teacher's name: _____ Lib. med. spec. name: _____
Curricular area: _____ Unit title: _____
Emphasis collection used: _____
Grade level: ____ Date evaluated: _____

1. How heavily did the collection get used for this unit?

   _____ Scale: 5 = Very heavy use
   4 = Heavy use
   3 = Moderate use
   2 = Some use
   1 = Not used

   _____ Actual circulation or use figures (optional)

   If not used, why? _____
   (Reasons for non-use may be rated in question 2)

2. How well did the emphasis collection respond to unit objectives:
   Rate only those that apply using the scale:

   SCALE: 5 = excellent
   4 = above average
   3 = average
   2 = below average
   1 = poor

   _____ Variety of media (print, AV, computer).
   _____ Materials which are current (as required by the topic studied).
   _____ Materials relevant to needs.
   _____ Materials which are durable and in good repair.
   _____ Enough materials for the number of students studying the unit.
   _____ Materials which span the reading/viewing/listening/comprehension levels of the students.
   _____ Materials which appeal to student interests.
   _____ Materials which span opinion/cultural/political issues if appropriate.
   _____ Ease of access to materials, equipment and facilities given reasonable time for planning.
   _____ New materials purchased for this unit.

   _____ AVERAGE RATING (include only the rated items) (can be done in the spreadsheet)

Quality rating symbol for collection map:

*** gold medal ***	5.00-4.50
** silver medal **	4.49-4.00
* bronze medal *	3.99-3.00
" frowny face "	below 3.00

3. Teaching techniques used:

4. Media activities:

   a. Information, production, research, and study skills taught (if needed):

   b. Other activities involving library media materials (brief description):

   c. How well did the activities contribute to the unit?

5. What do we need that we don't have? (books, AV, periodicals, etc.)

6. How well did the LMC staff, facilities, and equipment function?

7. How well did students respond to the LMC activities and materials?

8. What type of learners were short-changed?

9. Compliments and notes for improvement?

ASSESSMENT OF THE LIBRARY MEDIA COLLECTION'S RESPONCE TO CURRICULAR DEMANDS

Directions: Together, library media specialists, teachers and students should answer the following items:

Teacher's name: Mrs. Jones Lib. Med. spec. name: Nancy Smith
Curricular area: Science Unit title: Dinosaurs
Emphasis Collection Used: Dinosaurs
Grade level: 3 Date evaluated: Oct. 1986

1. How heavily did the collection get used for this unit?

   4 5 = Very Heavy use
   4 = Heavy use
   3 = Moderate use
   2 = Some use
   1 = Not used

   ___ Actual circulation or use figures (optional)

   If not used, why? _____
   (Reasons for non-use may be rated in question 2)

2. How well did the emphasis collection respond to unit objectives:
   Rate only those that apply using the scale:

   SCALE: 5 = excellent
   4 = above average
   3 = average
   2 = below average
   1 = poor

   4 Variety of media (print, AV, computer).
   ___ Materials which are current (as required by the topic studied).
   4 Materials relevant to needs.
   3 Materials which are durable and in good repair.
   2 Enough materials for the number of students studying the unit.
   3 Materials which span the reading/viewing/listening/comprehension levels of the students.
   5 Materials which appeal to student interests.
   ___ Materials which span opinion/cultural/political issues if appropriate.
   4 Ease of access to materials, equipment and facilities given reasonable time for planning.
   5 New materials purchased for this unit.

   3.8 AVERAGE RATING (include only the rated items) (can be done in the spreadsheet)

Quality rating symbol for collection map:

*** gold medal ***	5.00-4.50
** silver medal **	4.49-4.00
* bronze medal *	3.99-3.00
" frowny face "	below 3.00

3. Teaching techniques used:

   Discovery, teach one -- train one.

4. Media activities:

   a. Information, production, research and study skills taught (if needed):

      How to use the opaque projector.
      Identifying a subject catalog card.

   b. Other activities involving library media materials (brief description):

      Made large posters of favorite dinosaurs.
      Held a dinosaur trivia contest.
      Used a computer simulation in a teach one -- train one mode.

   c. How well did the activities contribute to the unit?

      The opaque activity went very well.
      The computer simulation was too difficult for the students to handle.

5. What do we need that we don't have? (books, AV, periodicals, etc.)

   Many more pictorial sources.
   A computer simulation which is easier.
   Several more reference books on dinosaurs.

6. How well did the LMC staff, facilities, and equipment function?

   Everything went very well.

7. How well did students respond to the LMC activities and materials?

   With the exception of the computer simulation, the students enjoyed the unit very much.

8. What type of learners were short-changed?

   Those who don't read well.

9. Compliments and notes for improvement?

   Definitely worth doing again.
   Either purchase or borrow many more materials.

COLUMN LABELS IN QUALITY EVALUATION SPREADSHEETS

Teacher's Name

LMS Name

Curricular Area

Unit Title

Emph.Coll.

Grade

Date

Use

Variety

Currency

Relevant

Durable

Enough?

Span rvlc

Interest

Span ocp

Access

New Items

Average

TECHNOLOGY EVALUATION FORM

Type of technology being rated:_____

Raters: Administrator:_____

Library media specialist:_____

Directions: Duplicate a copy of the questionnaire for each rater. For the technology listed above, rate each of the following items in each section. Combine the administrator's ratings and the library media specialists ratings and compute the average rating for each section and for the questionnaire as a whole.

A. The Philosophical Foundation for a Technology

According to the research and theory for _____ (name the technology), the benefits to accrue to the education of the students of this school are:_____

_____

_____

_____

1. The theoretical contributions of this equipment have been considered: Very little 1 2 3 4 5 Systematically

2. The results of research have been analyzed before this technology was adopted: Not researched 1 2 3 4 5 Researched

3. Input from teachers, library media specialists, administrators was considered before adopting the technology. Disagree 1 2 3 4 5 Agree

4. The level of involvement in this technology was planned in advance. Disagree 1 2 3 4 5 Agree

5. We know where we are going with this technology. Disagree 1 2 3 4 5 Agree

B. The Purchase Process for the Technology

Briefly stated, our purchase procedure for _____ (name the technology) is:_____

_____

_____

_____

1. We know what hardware is available on the commercial market. Disagree 1 2 3 4 5 Agree

2. We have drawn up specifications for purchase to allow competitive bidding within our quality criteria. Disagree 1 2 3 4 5 Agree

3. We have sought reputable dealers to bid on the equipment. Disagree 1 2 3 4 5 Agree

4. We have investigated warranties and repair services before we purchase. Disagree 1 2 3 4 5 Agree

5. Quality and sturdiness are as important as lowest price. Disagree 1 2 3 4 5 Agree

6. Some effort to standardize purchases of this equipment are made. Disagree 1 2 3 4 5 Agree

C. The Equipment Used in the Technology

Name the type of equipment used in this technology_____

How much equipment for this technology is owned and is in operating condition?_____

1. How often can patron requests to used this equipment be filled? Rarely 1 2 3 4 5 Always

2. The sophistication of our equipment needs our level of involvement for this technology. Rarely 1 2 3 4 5 Always

3. The cost of this equipment is reasonable considering its contribution. Rarely 1 2 3 4 5 Always

4. The life expectancy of this equipment is: Unacceptable 1 2 3 4 5 Acceptable

D. The Accompanying Software

The type of software used with this technology is: _____

_____

Approximately how many software items are available:

locally? _____

At the district center? _____

At a regional media center? _____

At a state media center? _____

Other center_____? _____

1. Access to this software is:	Limited	1	2	3	4	5	Extensive
2. Access to software across subject areas is:	Narrow	1	2	3	4	5	Broad
3. Access by teachers to this software is:	Inconvenient	1	2	3	4	5	Convenient
4. Students have access to this software on a free choice basis.	Disagree	1	2	3	4	5	Agree
5. The software is:	Outdated	1	2	3	4	5	Current
6. Money budgeted for this software on a regular basis is:	Inadequate	1	2	3	4	5	Adequate
7. The condition of the software is:	Poor	1	2	3	4	5	Excellent
8. The academic level of the software is:	Inappropriate	1	2	3	4	5	Appropriate

E. Facilities for Proper Use

What special needs are there for use of this equipment (screens? darkening?, special sound system? large screen needed? etc.)_____

_____

_____

1. Considering optimum facilities for this equipment, our are:	Inappropriate	1	2	3	4	5	Exemplary
2. Facilities are available for special needs.	Rarely	1	2	3	4	5	Always
3. Considering the risk of theft and mutilation, our facilities are:	Insecure	1	2	3	4	5	Safe
4. Storage for this equipment and its special needs are:	Inadequate	1	2	3	4	5	Adequate
5. Carts for moving and/or desks or special furniture are:	Inadequate	1	2	3	4	5	Adequate
6. Electrical needs for this equipment are:	Inadequate	1	2	3	4	5	Adequate

7. Seating for appropriate

audience size is: Inadequate 1 2 3 4 5 Adequate

Facilities for use of this equipment can accommodate:

8. Individuals: Disagree 1 2 3 4 5 Agree

9. Small groups: Disagree 1 2 3 4 5 Agree

10. Large groups: Disagree 1 2 3 4 5 Agree

11. Facilities for this equipment provide privacy and control distraction to others. Disagree 1 2 3 4 5 Agree

F. Personnel to Operate the Technology

What special training or personnel is needed to operate this technology?

_____

_____

1. LMC staff who operate this equipment are: Untrained 1 2 3 4 5 Trained

2. Teachers who need to use this equipment are: Untrained 1 2 3 4 5 Trained

3. Student operators (for teachers) are: Untrained 1 2 3 4 5 Trained

4. Students who use this equipment are: Untrained 1 2 3 4 5 Trained

5. Training and renewal of skills are conducted: Never 1 2 3 4 5 Regularly

6. Observers of our equipment operators would rate them as: Careless 1 2 3 4 5 Careful

G. Maintenance of Hardware and Software

Maintenance for this equipment is carried out by_____

_____

Maintenance of the software is carried out by_____

_____

1. Preventive maintenance for this equipment is: Inadequate 1 2 3 4 5 Adequate

2. Preventive maintenance for this software is: Inadequate 1 2 3 4 5 Adequate

3. Repair services for this equipment is: Inadequate 1 2 3 4 5 Adequate

4. Repair services are: Distant 1 2 3 4 5 Close by

5. Time needed to repair this equipment is: Unreasonable 1 2 3 4 5 Reasonable

6. The cost of repair for this equipment is: Unreasonable 1 2 3 4 5 Reasonable

7. Time for software repair or replacement is: Unreasonable 1 2 3 4 5 Reasonable

8. Cords and other hanging items are not a hazard to users. Disagree 1 2 3 4 5 Agree

9. Upon equipment malfunctions, users can expect immediate help/replacement. Disagree 1 2 3 4 5 Agree

H. Promotion of Use

Promotion of use for this technology is done by_____

1. Users understand the potential contribution of this technology. Disagree 1 2 3 4 5 Agree

2. Users understand the limitations of this type of media. Disagree 1 2 3 4 5 Agree

3. Promotional efforts for this equipment is: Non-existent 1 2 3 4 5 Active

4. Directions for operating machines are available on the equipment or in close proximity. Disagree 1 2 3 4 5 Agree

5. Individual users can expect one-to-one instruction in operating this equipment. Disagree 1 2 3 4 5 Agree