



A MANUAL FOR **DEVELOPING POLICIES AND PROCEDURES** IN AUSTRALIAN SCHOOL LIBRARY RESOURCE CENTRES

2nd edition

An initiative of Australian Library and Information
Association Schools and Victorian Catholic Teacher Librarians



Australian Library and
Information Association

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A Manual for Developing Policies and Procedures in Australian School Library Resource Centres. 2nd edition.

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INTRODUCTION

In a spirit of collegiality, the Australian Library and Information Association (ALIA) Schools and the Victorian Catholic Teacher Librarians (VCTL) make available to school communities *A Manual for Developing Policies and Procedures in Australian School Library Resource Centres Revised edition 2017*. It is the result of a joint working party and has been published to support the professional practice of staff in school libraries.

This manual sets out how to develop the policies and document the procedures that are essential for exemplary library management practices. The implementation of these policies and procedures aims to ensure equitable access to resources for all in the school community. A school library that is well managed is in the best possible position to offer the range of library programs and services that are essential to support the school's student learning goals.

The school library is an asset that is valuable in educational and financial terms. Educationally, there is a substantial body of research which demonstrates that school libraries can have a positive impact on student achievement, regardless of whether such achievement is measured in terms of reading scores, literacy or learning more generally (Lonsdale, 2003). Two of the key research findings from the Lonsdale study relate directly to the management of the school library. These are that the quality of the collection has an impact on student learning and that test scores are higher when there is a higher usage of the school library. Financially, the school library's print and electronic collection represents a significant investment. Developing policies and documenting procedures are ways in which the staff of the school library can demonstrate accountability for this investment.

The IFLA School Library Guidelines 2nd edition (2015) state that

A school library should be managed within a clearly structured policy framework that recognises the library as a core resource and centre for reading and inquiry. A school library policy should be devised bearing in mind the overarching policies and needs of the school and should reflect the ethos, mission, aims, and objectives, as well as the reality of the school (pp. 22-23).

In terms of the Australian Professional Standards for Teachers (AITSL, 2011) teachers working in the library have specific responsibility in terms of "policies and strategies to ensure the safe, responsible and ethical use of ICT in learning and teaching" (Standard 4.5) and to "lead colleagues in selecting, creating, and evaluating resources" (Standard 3.4).

A Manual for Developing Policies and Procedures in Australian School Library Resource Centres provides library staff with a practical, step by step approach to improving their professional skills and practice. A well-managed school library provides the foundation for innovative library programs that improve student learning outcomes. This manual supports the development of a school-specific manual of policies and procedures, which is an essential professional tool for school library staff.

DIFFERENCES BETWEEN THE 2007 AND THE 2017 EDITIONS

The changes made in this edition reflect the rapid development in technology and its impact on the nature of the provision of information services.

COLLECTION DEVELOPMENT

There has been a change in terminology when describing resources used throughout this edition. It became apparent that an analysis of the collection was more productive when a distinction was made between physical and networked resources. A definition follows:

Physical resources are those which include:

- Print: books (reference, fiction, nonfiction), periodicals, newspapers, pamphlets, ephemera
- Graphic: posters, pictures, maps, models, realia, kits
- Digital: stand-alone DVDs, CDs, CD-ROMS, not stored on a network

Networked resources are digital resources that are available on the school's network or the web and are accessed concurrently by many users such as full-text databases of journals/newspapers, online encyclopaedias, websites, Web 2.0 tools and resources.

Wall, J. & Ryan, S. (2010). *Resourcing for Curriculum Innovation*, Learning in a Changing World series. ACER Press, Camberwell, p. 15

ACCESS AND CIRCULATION

A change of name was required for the circulation section. Since the school library has a collection containing both physical and networked resources, it is necessary to broaden the concept of circulation to cover access to hosted digital resources.

COLLECTION ANALYSIS AND EVALUATION

It is no longer appropriate to give precedence to collection size and age when evaluating the suitability of a collection for its users.

A school library collection rubric has been developed to assist with planning for collection development and budgeting in the current context of increased complexity. The terms developing, foundation, effective and outstanding have been used to describe the different stages that could describe a collection. It would be on the basis of these descriptors that program budgets could be developed. These terms replace the terms 'foundation' and 'target' used to describe collection sizes previously in *Learning for the future*, 2nd edition (2001).

1. STAFFING

The school library provides essential information services for the planning and implementation of the school's teaching and learning programs. The quality of this service depends critically on the quality of the staff that provides it. *Learning for the Future: Developing Information Services in Schools*, 2nd ed. provides guidelines that describe the various roles of different personnel, recommended staffing levels and indicators that affect staffing requirements for school libraries in both primary and secondary schools:

Both professional and support staff are needed for the effective functioning of the school information services centre and the achievement of the desired learning outcomes. The person responsible for managing the school library resource facility should be a qualified teacher librarian.

(Learning for the Future: Developing Information Services in Schools.
2001 p.59)

Staffing patterns in the school library will vary from school to school according to individual educational needs. The level of staffing will influence the achievement of goals and should be taken into account when setting goals for library programs and for the collection.

The titles and role descriptions of staff in school libraries will also vary from sector to sector, school to school. Some of the possible roles can be described as follows:

TEACHER LIBRARIAN

A teacher librarian is an educator who holds a recognised teaching qualification and qualifications in librarianship. A teacher librarian is a registered teacher who is also eligible for professional membership of the Australian Library and Information Association. The role description of the teacher librarian may encompass elements from *10 ways that libraries power high performance schools (ALIA, 2017)*.

TEACHER IN THE SCHOOL LIBRARY

A teacher in the school library is a registered teacher who does not have professional qualifications in librarianship recognised by the Australian Library and Information Association.

SCHOOL LIBRARIAN

A school librarian has a professional qualification in librarianship but has no teaching qualification. A school librarian is eligible for professional membership of the Australian Library and Information Association but is not a registered teacher.

LIBRARY TECHNICIAN

A qualified library technician holds a diploma level or equivalent qualification and is eligible for library technician membership of the Australian Library and Information Association. A library technician provides library and information management and services support and is expected to work with minimal supervision in line with priorities set by their manager.

DIGITAL TECHNOLOGIES TECHNICIAN

A qualified digital technologies technician holds a diploma level or equivalent qualification in associated fields such as Information Technology, or multimedia. Digital technologies technicians provide technical support, for example operating and maintaining computer and digital technologies hardware, software and resources in the school and assisting in the provision of helpdesk services. A digital technologies technician is expected to work with minimal supervision in line with priorities set by their manager.

LIBRARY ASSISTANT

A library assistant operates routine library procedures and provides clerical support in maintaining the efficient functioning of the school library. A library assistant performs tasks under the supervision of a teacher librarian.

VOLUNTEERS

Volunteers can provide valuable help with routine tasks in the school library. The teacher librarian should provide some training to all volunteers. Volunteers require additional supervision and support.

SCHOOL LIBRARY PERSONNEL ROLE DESCRIPTIONS

Each person working in the school library should have a documented role description that identifies the following:

- title of position
- hours of employment
- duties to be performed and an indication of priority order
- the manager to whom they are accountable.

RELATED DOCUMENTS

- Australian Institute for Teaching and School Leadership. *Australian Professional Standards for Teachers*.
<https://www.aitsl.edu.au/teach/standards>
- ALIA/ASLA *Statement on Teacher Librarians in Australia*
<https://alia.org.au/about-alia/policies-standards-and-guidelines/alia-asla-statement-teacher-librarians-australia>
- *Learning for the Future: Developing Information Services in Schools* 2nd edition. (2001).
- *Standards of Professional Excellence for Teacher Librarians*
<https://www.alia.org.au/about-alia/policies-standards-and-guidelines/standards-professional-excellence-teacher-librarians>

2. COLLECTION DEVELOPMENT

When developing policy, refer to relevant school and sectoral policy documents. A collection development policy is essential to a school library as it explains why the collection exists. It is a public document which contains the vision and values of the school library. A collection development policy is relatively brief, is written in general terms and contains statements of principles.

COLLECTION DEVELOPMENT POLICY

A template for a collection development policy has these elements:

RATIONALE

This relates to the school's vision and links the collection development policy to the values of the school. It refers to equitable access to resources and the importance of the school library collection in the development of lifelong, independent learners and responsible citizens.

POLICY STATEMENT

This is succinct and encompasses the following principles:

- the goals and priorities of the collection
- the scope of resources covered in the collection development policy
- maintenance and development of the collection in a systematic way and in accordance with collection goals, established standards and library management principles
- funding by the school to ensure a collection that meets the needs of the school population and collection goals
- reference to national or international school library benchmarks. For Australia these are published in *Learning for the Future: Developing Information Services in Schools*, 2nd edition (2001)
- central resource management to ensure equity of access to school resources
- the personnel responsible for selection and the types of resources held.

AUDIENCE

Staff and community.

AUTHORSHIP

School library staff and/or committee.

RELATED DOCUMENTS

ALIA/ASLA Joint Statement on Library and Information Services in Schools

<https://www.alia.org.au/about-alia/policies-standards-and-guidelines/alia-asla-joint-statement-library-and-information-services-schools>

Information and Literacy for all Australians

<https://alia.org.au/about-alia/policies-standards-and-guidelines/statement-information-literacy-all-australians>

Learning for the Future: Developing Information Services in Schools, 2nd ed. (2001). Australian School Library Association & Australian Library and Information Association (ALIA). Available from

<http://www.asla.org.au/publications/learning-for-the-future--developing-information-services-in.aspx>

Selecting and Using Resources for Educational Purposes (2017). Department for Education and Child Development. Retrieved from https://www.decd.sa.gov.au/sites/g/files/net691/f/selecting-and-using-resources-guideline_0.pdf

Statement on Free Access to Information

<https://www.alia.org.au/about-alia/policies-standards-and-guidelines/statement-free-access-information>

DATE OF RATIFICATION

DATE FOR REVIEW

COLLECTION DEVELOPMENT PROCEDURES

A template for collection development procedures has these elements:

PROFILE OF THE SCHOOL COMMUNITY

This refers to the profile of the students, staff and community served by the school and its library, including social, cultural and academic aspects and any special features of the school. These factors influence the type of collection that is developed.

PROFILE OF THE EXISTING COLLECTION

Refer to the school library collection rubric, and analyse and briefly describe the current status of the school's collection as developing, foundation, effective or outstanding. See [Appendix C](#).

ACCESS TO RESOURCES

Refer to all content and resources selected and made available through the library including books, journals, and networked resources. Include details of access to digital resources, plus the opening hours of the library in terms of access to physical resources.

Address decentralised physical collections that exist in the school. Resources or teaching aids supporting learning programs may be stored in areas outside the physical library space, and catalogued for whole school access.

State if there are any sections of the collection which are not accessible to certain groups within the community. For example, student access to teacher reference and kits.

FORMATS WITHIN THE COLLECTION

Based on the descriptions in Wall & Ryan (2010) the collection contains a variety of resources in physical and digital networked format for the users.

Physical resources include:

- print: books (reference, fiction, nonfiction), periodicals, newspapers, pamphlets, and ephemera that are physical objects
- graphic: posters, pictures, maps, models, realia, kits and infographics
- digital: stand-alone resources such as DVDs, CDs or CD-ROMS that are not stored on or accessed via a network
- equipment: audio devices, cameras, projectors, video devices, printers, drones, ebook devices or tablet devices.

Networked resources are digital resources that are accessed from either:

- the school's network
- an institutional cloud-hosted system
- the web, including curated and catalogued websites, full-text databases of journals or newspapers, online encyclopaedias, streaming video and audio, and online collaborative tools and resources.

Networked resources may be accessed concurrently by many users depending on licensing.

COLLECTION GOALS

Establish short term and long term collection goals, and include strategies for measurement of progress against these goals.

BUDGET

See the section titled *Budgeting policy and procedures*. State how the budget is developed, the ratification process, and how expenditure is recorded. Also refer to the principle of central resource management if applicable.

SELECTION PRINCIPLES

Outline the criteria to be considered in the selection of individual resources and of aggregated resource services.

Resources purchased or made available by the school should be carefully selected in consultation with school staff. Library professionals apply professional knowledge and experience to ensure resources are relevant and suitable, and that the collection as a whole is balanced. School library reference works contain detail on broad, general and specific selection criteria for education resources. The list below represents a succinct overview.

Relevant to curriculum and recreational needs of the users

- Does the resource meet an existing or anticipated need?
- Will the resource be well-used?
- Is the cost justified in terms of the potential use and value to the collection?

Up-to-date

- Is the information current, especially in the areas of science, technology, social issues and geo-political content?
- Is the information and presentation in keeping with current educational practice?
- Are the tables, charts and other relevant data in the resource recent?
- Are links to websites active and current?

Accurate in the presentation of information

- Is the content clearly factual or fictional?
- Are facts and opinions identified and presented impartially?
- Is the content correct?
- Does the content reflect the national and local context or can it be adapted to do so?

Authoritative

- Is the author or creator qualified in the field?
- Is the publisher well established/reputable in the field?
- Has the author or creator produced other works in the same area?

Well presented

- Is the style appropriate for the subject and use?
- Do the illustrations extend the factual information or is their purpose purely decorative?
- Are the print, illustrations, multimedia and sound of a high quality?
- Is the resource physically attractive?
- Is the resource durable and well-constructed?

User-friendly

- Is the content organised logically and sequentially, and easy to navigate?
- Are ideas developed clearly?
- Is the information easily accessible through readable tables, charts or video content?
- Does the resource have an index, table of contents, chapter summaries, glossary, bibliography, or menus?

Respectful of all peoples

- Is the resource free of bias or prejudice?
- Does the resource present positive images of gender, disability and cultural and ethnic groups?
- Are the representations of people honest and accurate?
- Is the resource free of stereotypical images and role definitions?

Accurate in presentation of Aboriginal and Torres Strait Islander issues

- Does the resource meet the guidelines specified in the *Protocols for Libraries, Archives and Information Services (ATSILIRN, 2012)*? <http://atsilirn.aiatsis.gov.au/protocols.php>

Appropriate to age levels of users

- Is the print readable and of a format suitable to the age level of the target audience?
- Is the vocabulary appropriate?
- Is the resource suitable to the interest level of the intended users?

Criteria relevant to a school's specific context

Specific selection criteria may be required for schools with specialist religious or cultural learning programs, for example faith-based schools, bi-lingual schools, performing arts, sports and STEM academies.

See [Appendix B](#) for an example for a Catholic Religious Education collection.

RESOURCE SELECTION TOOLS

List the key resource selection and reviewing tools that the school has access to and which they will use to identify and select material for the collection.

Some reputable tools include:

- Children's Book Council of Australia (CBCA) booklists and journal: Reading Time, www.cbca.org.au
- Magpies, Literature Base and The Source: online subject guide to children's literature, www.magpies.net.au
- New South Wales Department of Education online journal: Scan, <https://scan.nsw.edu.au>
- Primary English Teachers Association Australia (PETAA) publications, www.petaa.edu.au
- Premier's Reading Challenge booklists from each state and territory
 - <https://online.det.nsw.edu.au/prc>
 - <http://www.education.vic.gov.au/about/events/prc>
 - <http://education.qld.gov.au/schools/readingchallenge>
 - <http://www.premiersreadingchallenge.sa.edu.au/prc>
 - <https://premierreadingchallenge.tas.gov.au>
 - http://www.education.act.gov.au/teaching_and_learning/chief_ministers_reading_challenge
- ReadPlus theme-based reviews of books and films, www.readplus.com.au
- Schools Catalogue Information Service (SCIS) Catalogue and reviews in newsletter: *Connections*, <https://www.scisdata.com/connections>
- Scootle online resources aligned to Australian Curriculum, <https://scootle.edu.au>
- State Library of Victoria online reviews of young adult resources: Inside a dog, <https://insideadog.com.au>
- West Australian Young Readers Book Awards (WAYRBA) booklists, <https://wayrba.org.au>
- Young Australians Best Book Awards (YABBA) booklists, <https://yabba.org.au>

SCOPE

State any specific scope or limitations that might apply, such as whether the school library aims to provide recreational resources for staff, resources for staff studying at tertiary institutions, or for parents or community members?

DONATIONS

State that the selection criteria outlined will be applied to all donations. Any donations not meeting the criteria will be returned to the donor or discarded.

COOPERATIVE RELATIONSHIPS WITH OTHER LIBRARIES

Describe any networks to which the school or staff belong and any special relationship with other libraries that may influence the collection.

MAINTENANCE AND PRESERVATION OF THE COLLECTION

State how ongoing decisions will be made about whether to mend, or discard worn physical items.

The following factors should be considered where appropriate:

- physical condition, including quality of paper, margins, illustrations
- cost-effectiveness of repair or replacement. If these are comparable, replacement is preferable. In the case where repairs will not restore the resource to a condition for normal use, the resource should be replaced
- number of other copies in the collection
- availability of the title for re-order
- value as archival resource.

In some special instances, an irreplaceable title of importance must be retained regardless of condition. Special handling should be given to such resources.

PRINCIPLES OF DESELECTION

Outline the principles to be used in monitoring, deselection or weeding of the collection so that at least 10% of the collection is replaced annually.

In poor physical condition

- Is the resource mildewed, yellowing, tatty, dirty, damaged, torn, worn out?
- Has the resource sustained irreparable damage?

Out-of-date

- Is the information in the resource incorrect due to social or geo-political changes?
- Is the information in the resource incorrect due to technical or scientific advances?
- Is the resource current?

Inaccurate

- Does the resource present distorted views of history?

Offensive

- Is the resource sexist, racist, ageist or offensive to social or ethnic groups?
- Does the resource present stereotypical images or characterisations?

Obsolete

- Is there a more current edition or format of a work available?
- Has the resource been used sufficiently to justify keeping it?
- Is the subject of current interest in the curriculum?
- Are multiple copies or licences still in demand?

Failure to meet the specific selection criteria

- Does the resource meet the specific selection criteria?

REPLACEMENT OR RENEWAL OF RESOURCES

Physical resources should not be automatically replaced, nor subscription resources renewed. There are several factors that could be considered when a resource is to be replaced or renewed:

- number of duplicate copies
- current demand for specific title or subject
- the extent of the present library collection on the subject
- the historical value of the resource
- the availability of a newer or better resource in the field
- availability of resource in a different, cheaper and more appropriate format.

CHALLENGED RESOURCES

On occasion a student, teacher, parent or community member may voice a concern about a resource that has been selected for inclusion in the school's collection. A written procedure to deal with challenges about resources is required. The following steps are recommended:

1. Where possible, deal with the initial challenge/query on an informal level. Resolution of the complaint at an early stage is greatly dependent on the person in charge of the school library maintaining a professional, assertive and calm manner.
2. Inform the Principal of the nature of the challenge/query. Explain the situation and secure the Principal's support. It is important to know that the Principal understands the situation and is willing to provide support as the challenge process unfolds.
3. Should the complainant wish to take the matter further, explain that the school has an established procedure designed to enable challenges to be heard fairly. Give the complainant a copy of the school library's collection development policy, including the section on dealing with challenges/queries to library resources. Outline the ensuing steps of the challenge process. By providing a copy of the collection development policy, the complainant is informed of the school and library positions on the issue. It is important they are informed of the professional selection guidelines by

which resources are chosen for inclusion in the collection. If necessary, the person in charge of the library should verbally explain the contents of the collection development policy.

4. Those complainants who wish to continue with their challenge/query must be given the opportunity to do so. A standard form which can be completed is provided. Briefly go through the form with the complainant. Clearly explain the challenge process, informing them of the steps to be followed. People do have a right to challenge or query resources and to expect their complaint to be given a fair hearing. Library staff must be very careful when issuing a complaint form that the form is not used as a weapon to deflect the complainant. The form should be in plain English (or other language where applicable). It should be clearly formatted, requiring succinct answers.
5. Convene the Complaints Committee. Membership of this committee could comprise the Principal, library staff, as well as a teacher, parent, student and wider community representatives. This standing committee will have been established at the same time as the challenge/query process was developed for inclusion in the collection development policy. Inform the Complaints Committee of the nature of the challenge/query. Ensure that they have ample opportunity to examine the resource in question. Explain the selection criteria to the committee. Make sure they understand how the resource reflects the criteria and its purpose in the curriculum and/or recreational framework. Discuss the complainant's challenge/query as detailed in the complaints form. Provide the committee with copies of reviews of the resource in question. Make a decision regarding the resource's future.
6. Inform the complainant, in writing, of the committee's decision. The decision may also be communicated verbally to the complainant. Keep all documentation relating to the challenge and its outcome on a permanent file.

REQUEST FOR RECONSIDERATION OF RESOURCES

The following form contains suggested questions and information that might be included on a complaint form. A school might choose to use all or only some of these questions, modified where appropriate to reflect the local mission/vision statements and educational learning statements of the school. A school might also wish to add extra questions to its form.

REQUEST FOR RECONSIDERATION FORM

RECONSIDERATION REQUESTED BY	
Requester's name	
Address	
Contact telephone numbers	
Name and year level of student or teacher	
Are you representing yourself or a group or organisation?	
DETAILS OF THE RESOURCE TO BE RECONSIDERED	
Author	
Title	
Publisher/producer	
Publication/copyright date	
Subject matter of the resource	
Location of the resource	
Date accessed	
Type of resource (book, game, website)	
DETAILS OF REQUEST	
State your objections to the resource. Please be specific by noting pages or sections	
Have you read, viewed or listened to the entire resource? If no, what sections did you read, view or listen to?	
What do you believe could be the result of a student reading, viewing or listening to this resource?	
Is there anything positive about this resource?	
What would you like the school to do in response to your request? Are you familiar with the school's policy in regard to selection of resources?	

3. BUDGETING

A realistic budget is required to enable school library programs and services to adequately and equitably serve the whole school. Circumstances in each school will differ. A school library budget should be seen within the context of the total school budget. As with all expenditure, school library costs compete against other costs for priority. It is important that adequate provision is made in each school's budget for the costs of the school library.

BUDGETING POLICY

A template for a budgeting policy has these elements:

RATIONALE

This relates to the school's vision, curriculum initiatives and resource needs.

SCOPE

What this budget covers, as well as other relevant budgets referenced to the collection development policy.

Responsibility for developing the budget, monitoring the expenditure and reporting.

POLICY STATEMENT

This is succinct and could encompass the following:

- library programs
- library services
- collection maintenance and development
- recurrent costs
- capital expenditure, if applicable.

AUDIENCE

Staff and community.

AUTHORSHIP

School library staff, Principal, finance department.

RELATED DOCUMENTS

- *Learning for the future: Developing information services in schools*, 2nd edition (2001)
- Vision statement and strategic plan of the school
- Collection development policy
- Library's annual report
- School library collection rubric.

DATE OF RATIFICATION

DATE FOR REVIEW

Three to five years after ratification.

BUDGETING PROCEDURES

The budget will be informed by reference to the school library collection rubric, the current status of the school's collection, and the short term and long term collection goals specified in the collection development policy. The following categories of expenditure may make up the budget for a school library. A template for budgeting procedures has these elements:

BUDGET CATEGORIES AND ITEMS

CATEGORY	ITEM	COST
<i>Capital Expenditure</i>	shelving and furniture	
	equipment	
	computer hardware and devices	
<i>Maintenance agreements</i>	library management system	
	security system	
	audiovisual hardware	
<i>Subscriptions</i>	journals	
	databases	
	ebook, audiobook platform	
	membership	
<i>Professional development</i> As per school policy	funding per staff member	
<i>Collection maintenance</i> Keeping the collection at its present stage Current resources are defined as less than ten years old	Plan to replace a proportion of the current collection annually, for example 10% Note average resource cost for nonfiction \$50 - \$100	
<i>Collection development</i> Working towards collection improvement Align to the school's collection goals as stated in the collection development policy and in keeping with the descriptors in the collection rubric Consider setting target collection size of recommended number of physical resources per student	Consider: <ul style="list-style-type: none"> new networked resources curriculum initiatives in the school requiring special focus, such as new integrated curriculum units updating of various sections of the collection such as science or technology addressing any gaps or weaknesses in the collection identified through use of the collection rubric changing demands including fluctuation in student enrolment changing nature of the school's academic, social or cultural profile 	
<i>Consumables</i>	peripherals, back up and storage media, printer supplies, batteries, cords, maker spaces materials	
<i>Promotional activities</i>	display materials, guest speakers, excursions, incursions, Book Week	
<i>Processing physical resources</i> Calculate as 15% of expenditure on physical collection maintenance and development	covering materials, labels, barcodes, stationery	
<i>Other</i>		
TOTAL COST		

CALCULATION OF THE CURRENT STATE OF THE PHYSICAL COLLECTION

With reference to the school's collection goals, identify the current state of the school's physical collection according to the school library collection rubric. A balanced collection for a school in which most students attend in face-to-face mode includes physical and digital networked resources. The number of resources in the physical collection is one measure of a collection's quality. There are a number of other criteria to be considered. The following strategy may be helpful for schools in reviewing and setting their collection goals for physical resources, particularly schools that are in developing and foundation stages.

In determining the current stage of the existing physical collection only consider resources that are catalogued and current. Current resources are defined as those that are less than ten years old. In some cases, the library management system program will be able to generate data about the size of the collection. Otherwise a strategy that will assist in determining the size of the collection is to count samples of the resources. To do this:

- Count individual physical items on a shelf or section of a storage system within an area of the collection, for instance in the Fiction collection.
- Check the publication date of each resource and count those that are more than ten years old.
- Subtract the number of resources that are over ten years old from the total number of resources on the shelf to give the current collection for one shelf, or section of the storage system.
- Continue in this manner until you have enough information to produce an average number of resources for a shelf or section of the storage system within the nominated area of the collection.
- Count the total number of shelves in the area and multiply the total by the average number you have established and the result will be an average size for one area of the collection.

Continue to use this sampling strategy for all other areas of the physical collection, such as nonfiction, reference or multimedia, to produce a total collection size.

Identify the school's recommended number of physical resources per student by referring to the *School Library Collection Rubric* page 6 Number of physical resources per student which is based on Table 2: Size of foundation collection in *Learning for the Future: Developing Information Services in Schools*, 2nd edition (2001).

TYPE OF BUDGET

In many schools, the person in charge of the school library will be required to develop an annual budget request submission. In some schools this will not be the practice. Therefore two models for budgeting procedures are described.

The first model details how to prepare a budget request submission that is a program budget, based on planned library programs, services and collection maintenance and development. This budget request submission would be forwarded to the school leadership team and considered along with budget requests from other groups within the school.

The other model is where the school leadership allocates an amount of money to the school library. In this model the person in charge of the school library is not required to develop a budget request submission. However, it is necessary to develop a plan for the expenditure of the allocated money according to priorities.

MODEL 1 - BUDGETING PROCEDURES FOR PREPARING AN ANNUAL BUDGET REQUEST SUBMISSION

The budget will be based on the needs identified and recommendations arising from the goals of the school library collection as described in the collection development policy.

PREPARING THE BUDGET

Preparing an annual budget request submission requires calculating expenditure in the areas listed in the table above, prioritising these and including a brief rationale for the expenditure budgeted in each area. It is important to clearly link this rationale to school priorities.

MODEL 2 - BUDGETING PROCEDURES FOR AN ALLOCATED BUDGET

Identify the amount that has been allocated to the school library. Where necessary negotiate with other areas about co-payment arrangements for resource purchase.

KNOWN FIXED COSTS

Calculate the total amount of any known fixed costs or future commitments, and allocate these funds according to the guidelines for expenditure outlined by the school. Fixed costs may include:

- capital expenditure
- maintenance
- subscriptions/memberships
- professional development

Subtract these known fixed costs from the total budget allocation.

DISCRETIONARY RESOURCE COSTS

Develop a plan, in consultation with relevant personnel, to divide the remaining resource funds according to priorities within the following areas:

- collection maintenance
- collection development
- consumables.

Prepare a document that records the amount allocated to each of the discretionary resource categories and any subcategories, such as the proportion planned to be spent on fiction, or ebooks or teacher resources.

PROCEDURE FOR MONITORING EXPENDITURE

The monitoring of the school library's budget is an important administrative task. This task includes:

- keeping a record of items ordered
- maintaining accurate records of expenditure
- checking purchases carefully against purchase order and invoice. Monitor outstanding 'back orders' and or 'out of print' and 'out of stock' items
- keeping copies of invoices
- cross-checking transaction reports against expenditure record. Any errors need to be resolved. Note school procedures for handling GST
- liaising with business manager and accounts officer

There are several ways of managing the school library budget, including using a spreadsheet or the

REPORTING OF ACTUAL BUDGET USE

In the preparation of the annual library report, the following items could be included when reporting on how the budget was utilised throughout the year:

- breakdown of budget allocation for different spending areas/categories
- overall summary of resources purchased that support the school library's priorities identified for the year, for example new curriculum topics, updating of specific collection section such as science and technology
- any targeted resource purchase to support library programs such as reading.

4. ORDERING

It is important to be accountable for the school budget expenditure on all resources that are catalogued in accordance with central resource management. Whether the monies expended are from the library budget or a departmental budget it is necessary to document the process for orders and acquisitions.

ORDERING POLICY

A template for an ordering policy has these elements:

RATIONALE

This relates to the methods for ordering resources for the school library including those resources purchased on behalf of other areas of the school, in accordance with central resource management. This will ensure that local protocol is followed for accounting and auditing.

POLICY STATEMENT

This is succinct and encompasses:

- the medium used for placing orders, that is via order books, phone, fax and/or online
- maintenance of ordering records for all resources purchased in accordance with central resource management
- conformity with the school's accounting procedures regarding ordering
- criteria for selection and review of suppliers
- levels of priority for placing routine and urgent orders.

AUDIENCE

Staff, community and auditors.

AUTHORSHIP

School library staff, Principal, finance department, other budget holders.

RELATED DOCUMENTS

- School's guidelines for ordering
- Acquisitions module of the library management system, if applicable.

DATE OF RATIFICATION

DATE FOR REVIEW

Three to five years after ratification.

ORDERING PROCEDURES

A template for ordering procedures has these elements:

PREPARING ORDERS

Where central resource management is practised, procedures for receiving, preparing and authorising orders from other budget holders will be required.

The recommended procedure for preparing orders includes:

- orders to be recorded in the manner mandated by the school, which could be in an electronic ordering system, or in triplicate using a school order book
- orders to be authorised by appropriate personnel ie Principal, Head of school library, and/or relevant budget holders
- recording of orders and invoices to be made in consultation with the Finance Department in accordance with local school practice.

PLACING ORDERS WITH SUPPLIERS

Maintain a record of regular suppliers of:

- books
- non book resources
- periodicals
- website and online subscriptions
- hardware
- service personnel.

Maintain a record of the contact details of regular suppliers:

- names
- addresses
- telephone numbers
- facsimile numbers
- email
- online ordering details including passwords
- ABN.

RECEIVING ORDERS

Upon receipt of the order:

- check for accuracy and condition
- check for functionality and access for networked resources
- sign or stamp invoice to verify goods received
- forward invoice to finance department.

The person in charge of the school library will ensure a record is kept of all resources purchased and the area in which money was spent. A month by month running balance of the budget should be maintained at all times. Refer to the budgeting policy and procedure. The school's finance office will have an account of transactions. This should be obtained in order to match against library order records.

5. CATALOGUING

The application of recognised standards to the cataloguing of resources is essential for uniform and effective access to the school's collection. Australia's Schools Catalogue Information Service (SCIS) provides schools with high quality, standards-based cataloguing and classification of both physical and networked resources, and is updated regularly. Standards-based cataloguing data requires a compatible library management system.

CATALOGUING POLICY

A template for a cataloguing policy has these elements:

RATIONALE

This relates to why resources are catalogued and the purpose it serves as a comprehensive access point for location of all school resources, and facilitates equity of access.

POLICY STATEMENT

This is succinct and identifies the importance of following cataloguing standards and the use of SCIS. It states the level to which content from providers of aggregated and networked resources such as journal databases and ebooks are catalogued.

The library management system and other networked content platforms selected by the school or jurisdiction are listed.

AUDIENCE

Staff and community.

AUTHORSHIP

School library staff.

RELATED DOCUMENTS

Abridged Dewey Decimal Classification and Relative Index. 15th ed.

Dewey Decimal Classification and Relative Index. 23rd ed.

Schools Catalogue Information Service

<https://www.scisdata.com>

SCIS Subject Headings

www2.curriculum.edu.au/scis/subject_headings.html

DATE OF RATIFICATION

DATE FOR REVIEW

Three to five years after ratification.

CATALOGUING PROCEDURES

A template for cataloguing procedures has these elements:

SCIS SEARCH

- Check whether the school subscribes to SCIS (or alternative professional cataloguing service), or whether the school's jurisdiction subscribes to SCIS on behalf of its schools
 - If not, take out an annual subscription to SCIS based on school enrolment at <https://www.scisdata.com/products/scis-data>
- Logon details will be forwarded once payment has been received.
- In the order screen at www.scisdata.com, or using the school's library system's Z39.50 interface, scan in the ISBNs for resources required.
- Create orders for records found and download these catalogue records.
- For resources without an ISBN, search the SCISWEB OPAC and create orders and download these catalogued resources.
- Load SCIS records into the library management system by following the instructions from the library management system.

RESOURCES NOT FOUND ON SCIS

- **Send resources not on SCIS to a SCIS cataloguing agency.**
SCIS have a cataloguing service included in your subscription. Forward physical resources or details of networked resources to the nearest SCIS Agency <https://help.scisdata.com/hc/en-us/articles/115011886848-Where-do-I-send-items-to-be-catalogued>. SCIS will create the catalogue records and make them available on the SCIS database. Physical resources will be returned to the school.
- **Set aside resources and re-check SCIS later**
The SCIS database is updated regularly and new resources are added as they are published and received by SCIS. Re-check the database on a regular basis.

- **Original cataloguing**

If the resource is required urgently it may be necessary to create a temporary record, or to perform original cataloguing if the school has a qualified staff member with cataloguing expertise. Cataloguing tools may be required, including:

- *Dewey Decimal Classification and Relative Index* 23rd edition
- *Abridged Dewey Decimal Classification and Relative Index* 15th edition
- *Resource Description and Access (RDA) Toolkit* <https://access.rdatoolkit.org>
- *SCIS Subject Headings*
https://help.scisdata.com/hc/en-us/article_attachments/115018721268/Guidelines_to_using_SCIS_Subject_Headings.pdf
- *SCIS Standards*
https://help.scisdata.com/hc/en-us/article_attachments/115018631147/SCIS_Standards_for_Cataloguing_and_Data_Entry.pdf

6. PROCESSING

A systematic approach to processing resources ensures that all stages of processing are completed. Procedures for each stage should be documented, with examples.

PROCESSING POLICY

A template for a processing policy has these elements:

RATIONALE

This relates to establishing or continuing standardised stages in the processing of resources to maintain comprehensive and consistent access to all school resources.

POLICY STATEMENT

This is a succinct statement that identifies the importance of a standardised approach to processing. It outlines any provision for outsourcing of resource processing.

AUDIENCE

School library staff and community, including volunteers.

AUTHORSHIP

School library staff.

RELATED DOCUMENTS

- relevant library management system manual
- contracts with providers of shelf-ready processing, if applicable

DATE OF RATIFICATION

DATE FOR REVIEW

Three to five years after ratification.

PROCESSING PROCEDURES FOR PHYSICAL RESOURCES

A template for the processing procedures for physical resources has these elements:

The procedures for processing physical resources, specified in terms of:

- record of supplier and cost (and replacement cost if discounted)
- placement of barcode, if applicable
- placement of call number label, if applicable
- placement of school stamp, if applicable
- placement of due date slip, if applicable
- placement of security tag, if applicable
- type of covering resource, if applicable
- type of repackaging, if applicable.

The following table provides a model for how processing procedures should be standardised and recorded.

ELEMENTS OF PROCESSING	BOOK	NON BOOK SINGLE ITEMS
Supplier and item cost	Record information in a consistent location, eg on the inside of the front cover	Record details in LMS and on resource if appropriate
Barcodes	Place barcode in predetermined, standardised position eg top right hand corner of back cover	Place barcode in predetermined, standardised position on resource For Kits record barcode number on each item
Call number label Collection label	Place label in predetermined, standardised position, eg on spine at a predetermined height measured from the bottom For titles where multiple copies are held, consider inclusion of copy numbers on label Include the correct prefix for specific collections or distributed collections as outlined in cataloguing procedures	Place or write label on resource in predetermined, standardised position
Genre labels Reading level labels	If applicable, affix relevant genre labels and/or reading level labels as specified in cataloguing procedures	Place or write label on resource in predetermined, standardised position
School stamp	Place the school stamp in the specified, standardised positions, eg title page, back page, page 20	Place school stamp on resource (or write) in predetermined, standardised position
Due date slip, if applicable	Place the due date slip in the specified, standardised position eg either the title page or back page of the book	
Security tag, if applicable	Place security tag in specified, standardised location, eg inside back cover	Place security tag on resource in predetermined, standardised position or as per supplier's instructions
Repackaging	Not applicable Refer to 'Kits' for multiple copy sets	Decide where the resource is to be physically stored in the school library Determine the form of packaging is appropriate, eg hang up bag or storage box
Covering	Detail which type of covering material is appropriate for the book covers, eg adhesive covering for paperbacks, single fold for books with dust jackets, non-adhesive covering for hardback books	Use appropriate protection for barcodes and labels, as necessary

***Kits**

Resources that are made up of two or more components, two or more of which belong to distinct material types, for example printed text and sound recording.

When two or more types of media need to be catalogued together, it may be necessary to repackage the items in a hang up bag or audiovisual box. The contents of the kit are listed on a label attached to the package.

All the above procedures need to be followed and recorded for the processing of kits.

PROCESSING PROCEDURES FOR NETWORKED RESOURCES

Processing procedures for networked resources involve recording on the library management system:

- cost and source
- subscription renewal dates
- licence details
- vendor restrictions on access, if applicable
- URL and access points for promotion of networked resources.

7. ACCESS AND CIRCULATION

Access ensures that resources selected and acquired to support the learning and teaching programs of the school are available on an equitable basis, and in a user-friendly manner.

Circulation records the interaction between patrons and physical resources and enables the school library staff to locate resources at any given time.

ACCESS AND CIRCULATION POLICY

A template for an access and circulation policy has these elements:

RATIONALE

This relates to the policies that are in place to ensure effective and equitable access to resources by the school community, including policies to ensure adherence to supplier conditions related to networked resources.

SCOPE

An access and circulation policy covers access to, and borrowing of, both physical and networked resources using the systems available to the school.

POLICY STATEMENT

This is succinct and should encompass the following:

- preferred access points for physical and networked resources, with due consideration for balancing legal and ethical access with open access
- principles related to integration with the school's digital architecture and IT policies, including single sign on, supported platforms, software and support
- categories of access and levels of access to school online systems and resources by individual users
- categories of patrons and borrowing privileges
- categories of resources
- loan conditions and periods for physical resources, including loan duration, overdue loans, reservations, renewals, bulk loans, recalls, holiday borrowing
- access conditions for networked resources and any restrictions

- security system, if applicable
- responsibility for issuing resources and accountability for circulation or access records
- teacher access to resources
- accountability for lost and damaged resources.

AUDIENCE

Staff and community.

AUTHORSHIP

School library staff, Principal.

RELATED DOCUMENTS

- Library management system manual
- Site licences and agreements for subscriptions and instruction manuals for online platforms and services
- School information technology policy
- School student management system
- Copyright policy.

DATE OF RATIFICATION

DATE FOR REVIEW

Three to five years after ratification.

ACCESS AND CIRCULATION PROCEDURES

A template for access and circulation procedures has these elements:

ACCESS TO NETWORKED RESOURCES

- document the extent to which networked resources are accessible within the school and remotely
- document any device-specific access requirements, such as operating system, software plug-ins or browsers
- document whether access to networked resources is via school's network logon, IP access or a resource-specific authentication
- document how school-wide network access passwords are kept secure, for example are not displayed on public internet pages
- document the categories of access and levels of access to school online systems and resources by individual users
- document how patrons will be trained in use of online systems, including in the use of the library catalogue to access networked resources and use of ebook platforms

- document the process for providing ongoing reminders of ethical access to networked resources, including user names, passwords, sharing and file management
- establish and promote user-friendly prioritisation and reservation procedures for networked resources with limited user access licences.

CIRCULATION OF PHYSICAL RESOURCES

The stationery and peripherals required for patron and resource identification and the procedures for loans and returns will be determined by the library management system in use.

CIRCULATION REQUIREMENTS FOR PHYSICAL RESOURCES

Document the resources required for circulation, for example:

- patron ID barcodes
- resource barcodes
- barcode scanner
- keyboard access
- due date slip, if applicable
- date stamp, if applicable
- self-service lending system.

PREPARATION

The following should be considered:

- parameters for patrons using library management system
- production and management ID for patrons, for example consider whether ID is library-specific, or incorporated with school or transport system ID
- synchronisation of patron details and identification codes, for example student ID numbers, barcodes and logins between school, library and external databases
- physical storage of ID, including whether users retain their ID, or if library retains all or some IDs

BORROWING OF PHYSICAL RESOURCES

a. Resources issued by library staff

Outline the procedures to:

- present resources at circulation desk
- produce patron's ID
- follow circulation borrowing prompts
- identify patron's barcode, observe patron's name/picture on screen
- scan resource's barcode, observe that name and resource title correspond
- use date stamp, if applicable
- use security system, if applicable.

b. Self-checkout

- training of patrons in use of self-checkout system
- production and display of help information for users.

RETURN OF PHYSICAL RESOURCES

Outline procedures for:

- dealing with circulation returns prompts
- scanning resources, observing that the resource and title on screen correspond
- re-activation of security tag, if applicable
- sorting returns
 - resource is on reserve and put aside
 - resource needs repair and put aside
 - location-specific or transit requirements
- re-shelving of resources.

RENEWALS

- application of rules regarding renewals
- dealing with circulation renewal prompts.

OVERDUES

Document routines for regularly:

- running overdue reports
- notifying relevant patrons and if necessary parent/carer
- collecting fines if appropriate
- collecting payment if appropriate.

LOST OR DAMAGED RESOURCES

Document routines for regularly:

- identifying resources that are lost
- notifying relevant patron and if necessary parent/guardian
- organising suitable replacement of resource
- implementing the accountability policy for lost or damaged resources.

RESERVATIONS

Document routines for timely notification to patrons of available reserved resource.

TEACHER BORROWING

Document procedure for teacher borrowing, if different from that used by students, for:

- bulk loans
- annual loans
- hardware and equipment
- class sets
- periodicals
- other resources such as multimedia.

HOUSEKEEPING PROCEDURE

Document activities that should be run on a daily basis as directed by the school's library management system. This may include:

- updating circulation statistics
- running backup
- generating overdues.

Document activities that should be run on a weekly basis as directed by the school's library management system. This may include:

- updating circulation statistics
- maintaining circulation transactions
- rebuilding circulation transaction database
- deleting unwanted report files
- checking updated or new titles for online resources and advising interested patrons.

Document activities that should be run on a monthly basis as directed by the school's library management system, such as reindexing of circulation files.

Document activities that should be run on an annual basis as directed by the school's library management system. This may include:

- updating patron details, for example student management system import, student rollover, deleting departing students
- archiving loan histories.

PROCEDURES FOR CIRCULATION IN DECENTRALISED COLLECTIONS

Decentralised collections may exist in the school in which resources or teaching aids supporting learning programs are stored in areas beyond the physical library space.

This could include such items as:

- classroom collections
- collections of class sets
- teacher reference collections
- multimedia collections
- curriculum theme boxes
- textbook collections.

Additional procedures for consideration with decentralised collections could include:

- accurate location of items held in decentralised collection will be available to all users via the Library Management System, for example using a collection code or location flag
- a circulation procedure is established which records the use and return by individuals, of resources within this collection
- documentation of person/s who are responsible for the access, use and return of resources held in decentralised collections, and their inclusion in stocktake, for example class teacher, faculty coordinator or support staff.

8. STOCKTAKING

Accountability for resource management is a school responsibility delegated to business managers and managers of key school facilities. As a school resource, the school library requires an evaluation of its organisation and service as part of its accountability. Stocktaking is a major evaluation procedure. Therefore, a commitment to this process should be clearly stated in the school policy documentation and the school library policy. A policy statement reflecting the need and scope of regular and systematic stocktaking is necessary to ensure the support and understanding of the school community. Further, the policy regarding stocktaking should be clarified on a regular basis.

STOCKTAKING POLICY

A template for a stocktaking policy has these elements:

RATIONALE

This relates to the school's need to undertake a regular and systematic stocktaking of physical and networked resources that will assist in maintaining and evaluating the collection. Stocktaking will:

- indicate losses to physical resources and links to networked resources that are no longer working
- be an essential tool in future collection development and planning
- assist in the review of current procedures for security, services and circulation
- assist in the maintenance of a current and useful collection and ensure that the database accurately reflects the existing collection

- identify areas of collection strengths and weaknesses and provide a means of ensuring curriculum initiatives are well resourced
- facilitate the removal of resources in the collection which are unused, out-of-date, damaged or no longer appropriate
- provide statistics which can be helpful when writing submissions and can contribute to the evaluation of the school library's performance and the provision of service
- locate physical resources which are dispersed throughout the school
- account for decentralised resource collections throughout the school.

POLICY STATEMENT

The school policy regarding stocktaking should be specified in terms of the:

- extent of stocktaking: total or partial, including reference to networked resources
- frequency of the stocktaking, for example annually
- most appropriate time/s of the year for stocktaking
- restrictions on access to the school library and its services during stocktaking
- estimated duration of stocktaking
- extra assistance required
- report to the school community.

AUDIENCE

Staff and community.

AUTHORSHIP

School library staff, Principal.

RELATED DOCUMENTS

- Library management system manual
- Stocktake report from previous year
- Collection development policy
- Manuals of networked resources
- Link checking software.

DATE OF RATIFICATION

DATE FOR REVIEW

Three to five years after ratification.

STOCKTAKING PROCEDURES

Stocktaking is time consuming and requires clear guidelines for those involved in the exercise. It is recommended that the procedures be written and distributed to those assisting. The procedure is influenced by the specific library management system in use, and should also refer to decentralised collections.

A template for stocktaking procedures has these elements:

PREPARATION

Outline procedures to:

- negotiate with the school administration to select the most appropriate time/s for stocktaking
- determine if a total or partial stocktaking is to be undertaken
- advise staff and students in a timely way about possible disruptions and alternative arrangements
- offer incentives to return resources and shelve all relevant resources
- decide which services may be curtailed during the period of the stocktake
- decide the most efficient way of stocktaking the resources
- check that hardware needed for the stocktake is functional
- gather the equipment needed: relevant manuals, barcode reader, computer, printer, paper, trolleys, removal and repair boxes
- ensure personnel involved in the stocktake understand the process
- make sure all library software housekeeping tasks are up to date.

PROCESS

For networked resources:

- generate usage statistics of subscription services e.g. databases, e books, to determine whether there are benefits to retaining the resources in the collection. Following analysis, decide whether the resource should be renewed. Refer to the collection development policy section.
- use a link checker to identify active, dead and changed links for catalogued websites
- update catalogue and other content systems where necessary.

For physical resources outline procedures to:

- work systematically:
 - work shelf by shelf and section by section
 - scan carefully each resource and check accuracy of record if possible
 - decide if resource is to be removed
 - decide if resource is to be repaired
 - scan all relevant resources
- finalise the stocktake, according to the library management system
- generate reports according to the library management system manual.

FOLLOW UP

It is essential to systematically work through each report and deal with the appropriate resources as follows:

MISSING PHYSICAL RESOURCES

Outline the procedures to:

- check shelves again for missing physical resources and if resources are located, follow stocktaking process
- distribute, if appropriate, the missing resources list to staff and students and request they search for the resources
- upon return of resources, follow stocktaking process
- resources still missing should be marked as missing or lost on the database, according to the library management system manual.

DELETIONS

Any resources identified for removal during stocktaking must be deleted from the database according to the library management system. It is appropriate to deselect resources in association with stocktaking. Around 10% of resources should be replaced annually with reference to the collection development policy.

REPAIRS

Outline the procedures to repair resources appropriately.

POST-STOCKTAKE PROCEDURES

Following the stocktake, it is essential to amend the library management system to maintain its accuracy. Priorities may be set as to the order and importance of all tasks generated by the stocktake.

Statistical records of resources must be adjusted. A report should be compiled and presented to the school administration. All stocktake reports should be kept for comparison with subsequent stocktakes. Information that emerges from the stocktaking reports will influence future acquisitions. Where there are areas of high loss due to missing resources or deletions, purchases should be made to fill the gaps.

9. COPYRIGHT

Schools have access to content that is subject to copyright restrictions, as well as to content that is published under open licences. Licensing agreements with various copyright agencies have been formulated to recognise the rights of copyright owners to receive payment for use of their intellectual property, and to curtail indiscriminate copying and distribution of copyright material. A sense of justice is required to respect these rights and to limit copying according to licensing agreements, or to meet any fair cost involved in using works.

COPYRIGHT POLICY

A template for a copyright policy has these elements:

RATIONALE

This relates to the school's vision statement, access to learning resources, justice for authors and creators of work, copyright law, copyright protection and the legal requirements of licensing agreements.

POLICY STATEMENT

This succinct statement acknowledges the:

- legal jurisdictions under which the policy operates
- personnel given delegated responsibility with regard to copyright
- the availability of openly licensed content
- the importance of following the legal requirements of licensing agreements with regards to print, off air or digital media.

COPYRIGHT INFRINGEMENT

This area would identify the consequences of breaching copyright.

AUDIENCE

Staff and community.

AUTHORSHIP

School library staff, Principal, Music directors, Performing Arts teachers, Media teachers, IT teachers and Religious Education coordinators.

RELATED DOCUMENTS

- Smartcopying website
 - Schools <http://smartcopying.edu.au/information-sheets/schools>
 - Open education resources
<http://smartcopying.edu.au/open-education/open-education-resources>
- Australian Copyright Council www.copyright.org.au
- Copyright agreements for schools.

DATE OF RATIFICATION

DATE FOR REVIEW

Three to five years after ratification.

COPYRIGHT PROCEDURES

A template for copyright procedures has these elements:

LIST OF AGREEMENTS

Identify which copyright agreements pertain to the school and what activities each licence covers. The following is a list of copyright agreements relevant to schools:

- Copyright Agency (CA)
- Australian Mechanical Copyright Owners Society (AMCOS)
- Screenrights
- Australian Performing Rights Association (APRA)
- Roadshow Public Performance Licensing (co-curricular)
- One License (formerly Word of Life International)
- Christian Copyright Licensing International (CCLI).

APPROPRIATE SIGNAGE

Outline procedures to:

- identify equipment that requires signage including photocopiers, scanners, computers and recording devices
- display the appropriate signage, depending on the equipment
- check regularly that signage is visible

LABELLING OF CONTENT

Outline procedures for labelling of all copyright material, digital and physical with reference to jurisdictional or sectoral requirements, for example Australian schools consult SmartCopying <https://www.smartcopying.edu.au>

PROFESSIONAL DEVELOPMENT

Outline procedures to:

- attend external copyright in-services
- distribute professional reading matter to members of the audience
- update staff on their copyright responsibilities.

GLOSSARY

Access	Access to resources for all on an equitable basis is a key element of the library's purpose. Access to digital networked resources requires additional attention to issues such as authentication.
Acquisitions	The process of selecting, ordering and receiving resources.
Aggregations	An aggregation is a group of resources that is distributed or managed as a bundled set, rather than as individual items of content.
ALIA	The Australian Library and Information Association [ALIA] is the professional organization for the Australian library and information services sector. It seeks to empower the profession in the development, promotion and delivery of quality library and information services to the nation, through leadership, advocacy and mutual support.
ALIA Schools	The Australian Library and Information Association Schools is a group within ALIA which promotes the interests of school libraries and library staff. The group also provides opportunities for professional development, lobbies for school libraries with state and local groups, liaises with other groups, identifies and analyses current trends in school librarianship whilst maintaining the profile of school librarianship within ALIA.
AMCOS	The Australasian Mechanical Copyright Owners' Society [AMCOS] is a music copyright collection society that represents music publishers and writers from around the world for rights in the reproduction of their music.
APRA	The Australasian Performing Rights Association [APRA] is a not for profit organization that collects royalties on behalf of its members, and by agreement, for all the copyright owners around the world.
ASLA	The Australian School Library Association [ASLA] is a national peak association in the field of school librarianship and school library resource services.
Audiovisual	A resource that combines sound and visual images.
Auditing	Specifications and standards of accounting (see ordering section).
Barcode	A pre-printed label that contains a certain number of digits, as directed by the library management system that are allocated to resources and patrons.
Borrow	The operation which establishes a record of a catalogued resource lent to a particular patron.
Budget	An annual submission detailing costs, expenditure on resources and capital items.
Bulk loan	A number of resources, borrowed by a patron, that exceed normal limits.
CA	The Copyright Agency (CA) is an Australian copyright management company whose role is to provide a bridge between creators and users of copyright material and to license the copying of their works to the general community.

Call number	Indicates the location of the resource in the school library. Fiction call numbers are usually three letters. Non Fiction call numbers are a combination of numbers, usually from Dewey Decimal Classification, and letters.
Capital expenditure	Money spent on resources such as furniture, shelving and equipment.
Catalogue	The complete list of the school library's holdings that are systemically catalogued.
CBCA	The Children's Book Council of Australia [CBCA] is a national not for profit organisation, established in 1945 to promote children's literature and children's reading.
Central resource management	The organisation of all resources in a manner which ensures maximum access by the school community. This organisation, through the school library, means that the resources are processed and catalogued in a systemic way. Depending on the physical facilities existing in the school, resources may be centrally catalogued but not centrally housed.
Chart	Graphic resources that include tables and diagrams that present classified or analysed data.
Circulation	Circulation is the act of recording interaction between patrons and physical resources. A circulation system should enable library staff to locate resources at any given time (See access and circulation section).
Class sets	A set number of resources, usually books of the same title, stored together, possibly in a box, for easy access.
Consumables	Items such as stationery, print supplies and cables that are consumed rather than returned to the collection.
Current	In determining the size of an effective collection consider only resources that are catalogued and current. Current resources are defined as those that are less than ten years old. Resources older than ten years may remain on the shelf if it is considered appropriate, however, these are not counted as part of effective collection size.
Database	Collection of data or file information in a form accessible by a computer or indexed in a machine readable format.
Decentralised collections	Collections that are centrally catalogued but located outside a physical library space.
Deletions	Any resources removed from the library management system because they are no longer appropriate to the collection. Check the manual of the school's library management system for details about how to delete.
Deselection	Resources that are considered inappropriate for the collection are removed from the collection and deleted. These resources could be deselected for a variety of reasons. Refer to the collection development policy and procedures for specific criteria.
Dewey Decimal Classification	A library classification system that is used in many libraries. This system divides knowledge into ten broad categories.

Digital resource	Electronic resource that is either standalone physical and networked.
Due date slip	A slip of paper that records the date a loan item is to be returned.
Ebook	A book published in digital form and read on computer or electronic device.
Fiction	Stories and novels written or produced for the reader's enjoyment.
Graphic materials	Non-moving, opaque, visual resources that provide information through images, such as tables and drawings.
Hardware	Equipment used to view or listen to non-book resources.
Housekeeping	Maintenance tasks specified by a library management system according to the protocols in the user's manual.
ISBN	International standard book number. A unique number allocated to a particular edition of a book.
Kit	Resources that are made up of two or more components, two or more of which belong to distinct material types such as printed text and sound recording. A single catalogue record is created and the contents of the kit are listed on a label attached to the package.
Learning Management System	Software for creation, management and delivery of educational programs.
Library Management System	Software for management of the functions of a library, usually including acquisitions, cataloguing, circulation and a search interface.
Loan period	The period of time that the resource is available for loan. This can be determined by the type of patron (teacher or student) or the type of resource (fiction, nonfiction, DVD).
Multimedia resources	Electronic resources that combine different formats such as animation, video and interactive content.
Networked resources	Networked resources are digital resources that are available on the school's network or the web and are accessed concurrently by many users such as full-text databases of journals/newspapers, online encyclopaedias, websites, Web 2.0 tools and resources.
Non-book	A resource, other than equipment, that is not in book format.
Nonfiction	A text produced to provide information.
OPAC	Online public access catalogue is a computer workstation or interface provided by the school library to search its catalogue.
Open License	Open License (formerly The Word of Life International) is an agency which offers a combined copyright license at a reasonable rate to assist churches and schools to conform with the law and enhance their liturgical celebrations.
Order	An order is a request to a supplier for the supply of resources. Check the school's procedures for placing orders.

Original cataloguing	Using Dewey Decimal Classification, <i>Resource Description and Access</i> and <i>SCIS subject headings</i> to create a record that conforms to national standards. Resources not on the SCIS database may require original cataloguing.
Overdue	A resource not returned by the contracted date.
Partial stocktake	Where a stocktake is completed on a section of the collection rather than the entire collection, for instance the Fiction collection. Completing a partial stocktake takes less time than a full stocktake. It is desirable to complete a full stocktake each year, however, the task can be broken down so that different sections of the collection are audited at different times throughout the year. Over the course of a year the complete stocktake is undertaken. Refer to the User's manual of the library management system for information about a partial stocktake.
Patron	A person who is able to access a library collection.
Peripherals	Any device, such as a memory stick or printer, concerned with input/output or storage.
Physical resources	Physical resources are those which include: <ul style="list-style-type: none"> • Print: books (reference, fiction, nonfiction), periodicals, newspapers, pamphlets, ephemera. • Graphic: posters, pictures, maps, models, realia, kits. • Digital: stand-alone DVDs, CDs, CD-ROMS not stored on a network.
Picture book	A picture book usually has 32 pages and has pictures that complement the text. It is possible to have a picture book that has no text. In this situation the story is told by the pictures alone. Picture books can be written for a range of readers, from early childhood through to older readers.
Realia	Three dimensional resources, for instance a skeleton.
Recall	A notification that is sent to inform a borrower that a resource, currently on loan to them, needs to be returned.
Recreational reading	Resources not specifically related to curriculum provided to support reading development and enjoyment.
Renewal	The re-issue of a resource loaned for a further period.
Reserve	A record that a resource is requested by another patron. Check the User's manual of the library management system.
Resource	Any item catalogued and circulated through the school library.
Return	The operation which cancels a borrowing record of a resource lent to a patron.
Rubric	A guide to evaluation that describes criteria for different levels of service, performance or value.
School library resource centre	A physical space within a school that is dedicated to providing access to information in a variety of formats.

SCIS	The Schools Catalogue Information Service [SCIS] is a database that contains catalogue records of educational materials. Each record has complete cataloguing details including abridged and full Dewey Decimal Classification numbers and SCIS subject headings.
Screenrights	Screenrights is a copyright agency that facilitates access to film, television and radio and provides payment to copyright owners for the use of their work.
Security tags	Stationery attached to a resource that links it to security checking equipment.
SmartCopying	Copyright advisory website for Australian schools.
Software	The programs used by a computer.
Spine label	A label stating the call number of a resource.
Stocktake	A systematic and regular checking of all catalogued resources.
Supplier	The person or organization that resources are purchased from.
Target collection size	The size the school library collection should be to meet patron demands.
Total stocktake	The entire collection is checked according to the stocktake procedures.
User	A person who uses a library collection.
VCTL	The Victorian Catholic Teacher Librarians [VCTL] is an association of representatives from Catholic school library networks across Victoria. It supports and maintains Catholic school library networks across Victoria, communicates with Catholic teacher librarians and liaises with other library associations at state and national level.
YABBA	The Young Australians' Best Book Award [YABBA] is a not for profit, volunteer organization interested in children's reading.

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APPENDIX A: SIZE OF FOUNDATION COLLECTION

A Select Survey of School Library Resource Centres in Australia, Canberra: ACLIS, ALIA, ASLA, Sept 1992, and Revision of Learning for the Future: Supplementary Surveys Canberra: ASLA, ALIA, 1999

ENROLMENT (NOTE 1)	COLLECTION SIZE (NOTE 4)	ACCESS TO ELECTRONIC RESOURCES (NOTES 5 AND 6)	ITEMS PER STUDENT (NOTE 2)
100	3,450	48	34
150	4,719	66	31
200	5,861	82	29
250	6,909	96	27
300	7,880	110	26
350	8,790	123	25
400	9,646	135	24
450	10,454	146	23
500	11,221	157	22
600	12,646	177	21
700	13,944	195	20
800	15,137	211	19
900	16,235	227	18
1000	17,250	241	17
1100	18,189	254	16
1200	19,061	266	16
1300	19,869	278	15
1400	20,620	288	15
1500	21,318	298	14
1600	21,964	307	14
1700	22,567	315	13
1800	23,115	323	13
1900	23,639	330	12
2000	24,114	337	12

Notes

1. Enrolment figures refer to actual numbers of students enrolled, except in schools with senior school enrolment where actual senior school enrolment is doubled and added to the number of students enrolled in the junior school.
2. Number of items per student at the traditional collection size.
3. For schools with enrolments of less than 100, the collection is calculated on 20 items per student, but no school should have a stock of less than a 1000.
4. The figures include all physical resources and is based on an up-to-date- collection with an average age of less than 10 years.
5. Access to electronic resources, in particular, subscription services and WWW is dependent on student access to the network and consequently the Internet. These figures are additional to the figures in the collection size.
6. The figures incorporate:
 - a. software available on CD ROM, floppy disk and installed on hard drive or file servers: 27%
 - b. electronic subscription services for full text, information or index services, www commercial subscription sites: 3%
 - c. teacher or school developed electronic materials available through the network or intranet: 5%
 - d. www sites that have been professionally selected according to designated criteria: 65%

Note:

The nature of electronic resources make them available to multiple users at one time, one-to-many, whereas traditional resources are based on a one-to-one use of the resource. To this end including an electronic resource as a physical item in a collection is not an indicator as to the numbers of users the resource will be available to at any one time. The survey¹ of electronic resources has been based on curriculum use and access types to electronic information.

This Appendix is reproduced with permission from *Learning for the future: Developing information services in schools*, 2nd ed. (2001). Curriculum Corporation, Carlton, Vic.

¹ A Select survey of electronic resources in Australian schools. ASLA, ALIA: Canberra, 1999

APPENDIX B: SPECIFIC SELECTION CRITERIA

RELIGIOUS EDUCATION COLLECTION

Suitable for inclusion in a Catholic school collection

- Is the resource theologically sound?
- Is the resource hermeneutically correct?
- Is the resource consistent with Diocesan policy for Religious Education?
- Is the resource doctrinally current?
- Is the resource culturally relevant?
- Is the resource supportive of Catholic belief?
- Is the imagination engaged by the type of language used?
- Is the resource supportive of the vision statement of the school?
- Does the resource have an imprimatur ~nihil obstat?

APPENDIX C: SCHOOL LIBRARY COLLECTION RUBRIC

APPENDIX C: SCHOOL LIBRARY COLLECTION RUBRIC

		DEVELOPING	FOUNDATION	EFFECTIVE	OUTSTANDING
1	Policy				
1a	Collection policy	There is no collection policy in development, or policy is out-of-date	A basic collection or selection policy exists	Collection policy and selection policy is current, linked to curriculum and is used to guide practice	Current collection policy and selection policy in place, are followed and reviewed, and have formal school-wide endorsement
2	User focus				
2a	Collection is responsive to the needs of the school community	No consultation with school community	Limited or ad hoc consultation with school community	Anecdotal verbal feedback and monitoring of requests from individuals	Formal surveys and consultation are regularly conducted with school community stakeholder groups, and used to inform practice
2b	Use of the collection	Minimal use, or no statistics available No user feedback sought regarding collection	Collection use is ad hoc. Anecdotal usage information and feedback only	Parts of the collection are well-used. Statistics are not used in planning or promotion Occasional feedback from user sought	Physical and networked collection used extensively. Analysis of usage statistics guides collection development and promotion Systematic user satisfaction review sought via surveys, interviews

		DEVELOPING	FOUNDATION	EFFECTIVE	OUTSTANDING
2 User focus					
2c	Accommodating the range of users' literacy capacity	No accommodation for the range of literacy capacity, and English as an Additional Language (EAL) needs	Basic accommodation for EAL, readers with low literacy and advanced readers	Adequate accommodation for EAL, readers with low literacy and advanced readers	Differentiation based on reading levels and languages based on analysis of reading level reports from digital libraries and/or sampling of physical texts for fiction
2d	Alignment to user interests	No attempt to match user interest	Ad hoc or selective consideration of user interests in selection of resources	Meets the needs of most users	Responsive collection development process with user input forming a priority in selection
3 Learning focus					
3a	Curriculum analysis and mapping to align with learning content	Minimal alignment to curriculum needs, teaching styles and assessment needs	Reactive response to requests is the sole method of identifying areas of insufficient resourcing, and is the minimum required for core learning areas	Current units of work are analysed, and holdings are checked to ensure breadth and depth	Resources that correspond to the school's curriculum map are tagged for effective retrieval via the catalogue
3b	Literature	Ad hoc collection of literary texts with no clear focus, no attempt to meet standards	Base collection of literary texts; limited range of authors, formats and genres	Effective collection of core literary texts, moderate range of authors, formats and genres	Outstanding collection of literary texts, extensive range of authors, formats, and genres, including classics, and contemporary

		DEVELOPING	FOUNDATION	EFFECTIVE	OUTSTANDING
3 Learning focus					
3c	Reading development	Limited, ad hoc availability of materials to support literacy development, and lack of responsiveness to needs of users	Base collection of materials encourages readers, and supports the literacy needs of the school	Effective collection fulfils diverse literacy needs, encourages wide reading, and is responsive to recreational reading interests	Outstanding collection that prioritises reading, and proactively meets a recreational reading for a majority of students and staff
3d	Collaborative programming	No collaboration with teaching staff to integrate the collection with research and classroom programmes	Ad hoc or limited collaboration with teachers to integrate the collection with research and classroom programmes	Collaboration with teachers to integrate the collection with research and classroom programmes	Ongoing proactive collaboration with teachers to ensure integration of the collection with the school's research and classroom programmes
4 Funding and value					
4a	Funding focus: Alignment of budget use to school and system priorities	Development budget is inadequate to reach foundation level	Budget is limited to essential resources	Budget allows for renewal of collection of less than 10% per year	Budget allows for renewal of collection of 10% per year plus enrichment or special interest collection building
4b	Budget allocation	Inadequate funding to allow systematic allocation across resource types	Ad hoc allocation of budget across resource types	Appropriate balance of budget allocation between physical and networked resources	Budget allocated according to % priorities specified in collection policy
4c	Partnerships that enhance access to resources	No partnerships or access to external resources, for example public library	Limited partnerships to extend access to resources	Some partnerships and engagement with broader resource networks	Actively partnering to provide enriched access, for example, consortia membership where more cost-effective

		DEVELOPING	FOUNDATION	EFFECTIVE	OUTSTANDING
5 Collection development					
5a	Professional collection development expertise	No educational or professional expertise	Minimal input from educational or professional expertise	Most collection development is guided by educational and professional expertise	High level of educational and professional expertise consistently employed in collection development
5b	Strategies for collection development according to documented selection principles	No strategy. Selection and purchases made ad hoc without reference to selection principles	Reactive selection. Some adherence to selection principles	Resources generally selected using selection principles; Use of resource lists and curriculum references	Consistent application of selection principles. Use of wide range of selection aids, including recommended resource lists, curriculum references, reviewing journals, professional selection aids
5c	Quality of content	No selection criteria	Minimal consideration of relevance, accuracy, authority and reliability in evaluating resources	Relevance, accuracy, authority and reliability are usually evaluated	Relevance, accuracy, authority and reliability are explicitly evaluated
5d	Legal and ethical information use	Non-compliance with copyright, licensing and labelling requirements, and no advisory service on legal and ethical information use	Ad hoc, inconsistent attention to copyright, licensing and labelling requirements Limited advice on legal and ethical information use	General compliance, and reactive approach to advice and education on legal and ethical information use	Whole school commitment to best practice in copyright, licensing and labelling for all content Users are given clear guidance on access rights and conditions

		DEVELOPING	FOUNDATION	EFFECTIVE	OUTSTANDING
6	Collection balance				
6a	Cultural diversity focus	No attempt to provide culturally diverse resources	Minimal consideration of culturally diverse resources	Collection of resources effectively reflecting multiple perspectives	Rich collection of resources reflecting multiple and culturally diverse perspectives
6b	Content balance across collection	The collection is haphazard with no plan	The collection has areas of significant imbalance but a plan is in place for development	The collection is somewhat balanced according to a plan, but has gaps or overstock in some areas	The collection is balanced according to % breakdown specified in collection policy
6c	Breadth of collection	Narrow collection, limited resources, not meeting curriculum requirements	Base collection supporting only curriculum requirements	Collection contains broad range of topics and literature, selection considers extension materials from external recommended lists	Collection contains a wide range of topics and literature beyond curriculum requirements, a high % of items from external recommended lists; wide range of publishers, enrichment resources and professional reading
6d	Depth of collection	Insufficient depth of coverage	Basic coverage, for example multiple copies of limited titles, or limited licences to networked resources	Collection depth providing effective access to both physical and networked resources	Full sets of recommended series, systematic coverage of key works; Generous provision for large group curriculum work, and highly popular recreational topics; study level collection in key professional areas

		DEVELOPING	FOUNDATION	EFFECTIVE	OUTSTANDING
7	Specific formats				
7a	Variety of formats	Collection is predominantly single format, for example resources are all digital, all physical, or no multimedia	Collection contains an imbalanced range of formats	Effective collection contains a balanced range of formats reflecting user needs	Collection contains a rich range of physical formats, engaging networked content and multimedia. Similar content in multiple formats meets user preferences
7b	Number of physical resources per student Reference *See Appendix A: Size of Foundation Collection (p.55)	Provides less than recommended ratio of physical resources per student, for example: <ul style="list-style-type: none"> less than 34 items in schools with enrolments of up to 100; 22 items in schools up to 500; 16 items in schools up to 1200 	Provides recommended physical resources per student at the level of: <ul style="list-style-type: none"> 34 items in schools with enrolments of up to 100; 22 items in schools up to 500; 16 items in schools up to 1200 	Slightly exceeds recommended physical resources per student at the level of <ul style="list-style-type: none"> 34 items in schools with enrolments of up to 100; 22 items in schools up to 500; 16 items in schools up to 1200 	Significantly exceeds recommended physical resources per student at the level of: <ul style="list-style-type: none"> 34 items in schools with enrolments of up to 100; 22 items in schools up to 500; 16 items in schools up to 1200
7c	Purchased networked collection resources	Minimal availability of networked resources	Basic collection of low value networked resources	A useful collection consisting of a range of subscription services, teacher-developed resources, ebooks	High-end subscription services, ebooks from more than one provider
7d	Free web-based content	No intentional selection or management of free web content	Minimal web content selected, not organised using standard platform	Websites selected and catalogued and teacher-developed resources managed	Websites selected and catalogued. Reviewed regularly. Teacher-developed resources collected and managed

		DEVELOPING	FOUNDATION	EFFECTIVE	OUTSTANDING
8	Collection management				
8a	Central resource management	No policy or adherence to central resource management policy. Collections dispersed and not recorded or centrally managed	Satellite collections are managed and catalogued on an ad hoc, inconsistent basis	General adherence. Not all resources centrally listed or well-described. Inconsistent metadata	All materials in the physical and networked collection are listed in the library catalogue with high quality standardised metadata
8b	Access to networked collection	Limited access to networked resources. Access is difficult for users or unreliable	Some access to networked resources using standard school log in	Effective and reliable access to networked resources by all users, on site and remotely using standard school log in; Content appropriate to user devices	Flexible, stable, mobile access to all networked resources 24/7 using standard school sign and preferred device Collection provides rich environment for users with particular physical challenges
8c	Collection's physical environment²	Physical environment and layout of the collection is inadequate and limits access by users	Physical environment meets basic needs in terms of layout and access to the collection	Physical environment is functional, and displays resources in good condition for user-friendly access	Physical environment is attractive and inviting, displays resources to best effect and facilitates extended hours access
8d	Tools for resource production	No provision for student or staff resource production of resources	Basic provision of equipment, tools and space for student or staff resource production	Effective provision of a range of technology, tools, space and support for student and staff resource production	Outstanding provision and promotion of maker spaces, technology, group activities for staff, student and community production of resources and knowledge products

² ALIA Schools & VCTL (2014). School library resource centre guidelines for self-reflection and evaluation, pp. 13-20. <https://www.alia.org.au/sites/default/files/ALIA%20Schools%20SLRC%20Guidelines%20final%20version.PDF>

		DEVELOPING	FOUNDATION	EFFECTIVE	OUTSTANDING
9	Collection evaluation				
9a	Resource evaluation and weeding	Physical and networked collection has not been reviewed or weeded	Physical and networked collection has not been reviewed or weeded in previous 2 years	Physical and networked collection has been partially reviewed and weeded within previous 2 years	Physical and networked collection has been fully reviewed and weeded within previous 2 years to inform collection planning.
9b	Average age of curriculum collection is aligned to school's collection policy	Average age of collection exceeds 10 years, or has new releases only	Average age of collection exceeds 10 years, or has disproportionate number of new releases	Average age is within 10 years of current date	Average age is less than 10 years of current date Social, geo-political, technology and science resources meet currency goals specified in the collection policy
9c	Stocktake	No stocktake or shelf checking	No stocktake in previous 2 years. Shelf checking occurs rarely	Partial stocktake within previous 2 years. Shelf check occurs regularly	Full stocktake within previous 2 years with minimal user disruption. Stocktake reports are analysed to inform planning
9d	Challenged resources process	No challenged resources process	Challenged resources process documented	Challenged resources process documented but inconsistently applied	Challenged resources process published and applied consistently

