

Recommendations

Based on the findings of the study, the following recommendations were made:

1. Planning for library services ideally should take place within the context of planning for total community services.
2. Communities should seek to provide improved public library service through public library system membership. School library service should be strengthened through the establishment of district media services to support library media programs in individual schools. In communities where this is not possible, consideration of combining small independent public and school libraries should occur only if the conditions given in the conclusions of this report are met.
3. Governance should be legally defined by formal contracts among the involved governing authorities. These contracts should clearly identify the responsibilities of each governing authority and provide for equitable division of property should dissolution occur.

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A STUDY OF THE COMBINED SCHOOL PUBLIC LIBRARY,

Phase III

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The State Library of Florida

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Barratt Wilkins, State Librarian  
The State Library of Florida  
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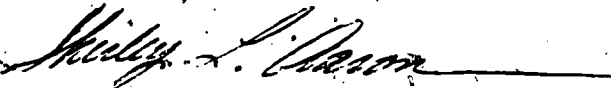
Dear Mr. Wilkins:

The enclosed report represents the culmination of Phase III, the final part of the study on combined school and public library programs. This report consists of a checklist which community members working with professional library personnel can utilize to determine whether a combined program will offer the most effective library service in a particular locality.

In order to develop this instrument a preliminary checklist based on information gathered from Phases I and II of this study was submitted to selected experts in the field who evaluated its effectiveness. Modifications were made based on their comments.

Throughout this as well as the other two phases of the study on combined school public libraries, members of the Bureau of Library Development have made invaluable contributions. Their pertinent suggestions and continuing cooperation stimulated a level of inquiry which benefited the study greatly. It was a real pleasure to work with such fine professional librarians. I hope that I will have the opportunity to work with you and your staff on other projects in the near future.

Sincerely,



Shirley L. Aaron

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## ABSTRACT

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## ABSTRACT:

In Florida, an increasing number of people are proposing the merger of public and school libraries as a logical way to improve services offered to users of all ages and to reduce expenditures. At this time concrete data on past and present attempts at consolidation in the state are not available to support or deny these contentions. Further, there are few guidelines available which can be followed by communities that are attempting to establish the feasibility of this organizational plan for their particular needs. These factors have prompted the State Library of Florida to fund a study which systematically examines the concepts of cooperative ventures and combination libraries to determine their potential for improving school and public library services in the state.

This year long study was begun in June, 1977 and is divided into three phases. Phase I, completed in September, 1977, involved: 1) the development of an interview schedule and other evaluative instruments to gather relevant information about combination programs; and, 2) the visitation of selected sites to investigate the factors which brought about the success or failure of this type of program. Phase II, completed in June, 1978, analyzed past and present merger attempts and multi type library cooperative activities in Florida to assess the present status of combinations and library cooperation in the state. In Phase III, completed in August, 1978, a checklist was developed to assist community members working with professional library personnel in deciding whether a combined library or another alternative offers the best library services in their particular locality. This checklist was evaluated by consultants who have been recognized for their expertise in the area of combined school public libraries. Modifications to the checklist were based in large part on their suggestions.

A CHECKLIST TO DETERMINE WHETHER A COMBINED LIBRARY PROGRAM  
WILL PROVIDE THE BEST SCHOOL AND PUBLIC  
LIBRARY SERVICES FOR A COMMUNITY.

INTRODUCTION

The checklist included below was developed as part of a State Library of Florida study of combined school public library programs<sup>1</sup> and was funded under the provisions of the Library Services and Construction Act as amended by Public Law 91-600. The purpose of this checklist is to help community members working with professional library personnel decide whether separate public and school libraries, a combined library, or another alternative will offer the best library services in their particular locality. Local professional library personnel and community members should initially contact the agencies in state government responsible for development and coordination of library services in order to ascertain the effect the combined program may have on legal aspects and governance of libraries and on the eligibility of the community to receive various types of state and federal assistance.

DIRECTIONS FOR COMPLETING THE CHECKLIST

Community members working with professional library personnel should indicate, by checking "yes" or "no" whether the element(s) referred to in each statement listed below can be obtained by or are presently available in the community considering the combined program. "Minimum" and "adequate" should be defined in terms of standards or guidelines used to evaluate other public and school libraries in a community. If no other public and/or school libraries exist in the area, measures utilized to evaluate libraries in similar types of communities in the state should be employed. If none of these criteria are available, the judgement of local professional librarians

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<sup>1</sup>Combined school public library program offers both school and public library programs in a single facility.

or state library consultants should be relied upon to establish operational definitions for these terms.

Directions for interpreting the responses of community members are included at the end of the checklist.

YES NO

\_\_\_ \_\_\_ la. The present tax structure of your community does or can generate the funds needed to support separate school and public library programs.

\_\_\_ \_\_\_ lb. Public library services offered in a separate facility can be established in your community as a result of expanded support services obtained through membership in a library system.

\_\_\_ \_\_\_ lc. Minimum school library media services in district schools can be obtained through support from the school system.

\_\_\_ \_\_\_ ld. The combined library provides the only opportunity for your community to obtain the following:

\_\_\_ \_\_\_ Professional library personnel with a specialization in school librarianship where no such position previously existed;

\_\_\_ \_\_\_ Professional library personnel with a specialization in public librarianship where no such position previously existed;

\_\_\_ \_\_\_ A means for strengthening available material resources;

\_\_\_ \_\_\_ An adequately planned program of services to meet the needs of public and school patrons.

\_\_\_ \_\_\_ 2. A legal basis exists for combining libraries either through general library laws or through legal rulings allowing exemptions to state statutes.

YES NO

3. Opportunities for the school to gain accreditation on a state and/or regional level are unaffected by the combined program.
- 
4. A preliminary study of the feasibility and suitability of the combined library program for your community has been conducted.
5. Concerned groups have carefully examined the complementary roles of the school and public libraries and are aware of the range of services and resources which must be offered to meet the needs of both user populations.
6. Community members are involved in and are very supportive of the decision to have a combined school public library program.
7. The concerned groups in your community regard the combined library program as a more economical means of offering adequate library services to both students and community members than to provide public and school library programs in separate facilities.
8. Continuing lines of communication have been established between the school board and the public library board in your community.
9. Citizens, the public library board, the school board and other elected government officials are willing and able to participate in preliminary planning for the combined library program.
10. The concerned groups with decision making authority who wish to initiate the combined library program are willing to



YES NO

establish a single board which has formal authority to plan for the library program.

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- \_\_\_ \_\_\_ 11. A legal procedure is available which permits the establishment of a single board to govern the combined program.
- \_\_\_ \_\_\_ 12. The concerned groups are willing to establish a single board to govern the combined program.
- \_\_\_ \_\_\_ 13. If two boards are to govern different parts of the combined program, their responsibilities will be specifically defined in a formal agreement drawn up during the planning phase.
- \_\_\_ \_\_\_ 14. A method exists for allowing one governmental body to advance funds to or contract for services with another local governmental body in order to finance the combined library program cooperatively.
- \_\_\_ \_\_\_ 15. A formal written agreement which carefully defines the responsibilities of each concerned party will be adopted during the planning phase.
- \_\_\_ \_\_\_ 16. Proposed formal agreements between concerned groups will cover areas such as program; facilities design and construction; responsibility for purchasing furnishings, equipment and materials for the library; purchase of the property; provision, selection and funding of personnel; identification of staffing pattern; building maintenance; responsibility for paying for the costs of utilities and provisions for modifying and terminating the program.

YES NO

17. The proposed program is a combined one offering a broad range of services to all community members rather than a separate school and public library program in the same facility.
- 
18. An adequate amount of money will be budgeted for the combined program to permit comparable library services to both students and other community members.
19. The school board and the governing authority for the public library are willing to contribute adequate funds to the combined program.
20. The library personnel who will work in the program understand and are committed to the concept of the combined library program.
21. A head librarian with sufficient expertise and knowledge in both school and public library areas will be hired to provide adequate direction for the program.
22. The professional personnel who assume(s) primary responsibility for planning and implementing school library media services in the combined program will meet the requirements for state certification.
23. The professional personnel who assume(s) primary responsibility for planning and implementing public library services in the combined program will meet state adopted criteria required for professional public library personnel.

YES NO

- \_\_\_ \_\_\_ 24. A sufficient number of clerical and professional staff members will be employed to offer comparable levels of programming to school and community members.
- 
- \_\_\_ \_\_\_ 25. The hours of operation of the combined library will be sufficient to offer a broad range of services for school and public library patrons and the staff will be assigned to guarantee adequate access to professional library personnel at times when students and other community members are using library services.
- \_\_\_ \_\_\_ 26. All staff members will be responsible to the same director.
- \_\_\_ \_\_\_ 27. Members of the staff will have comparable job classifications, the same salary schedule and benefits package.
- \_\_\_ \_\_\_ 28. Members of the staff will have comparable work schedules, annual leave, and holidays.
- \_\_\_ \_\_\_ 29. The library will be large enough to house a collection that will meet the needs of both school and public library patrons.
- \_\_\_ \_\_\_ 30. Funds will be available to purchase selection tools which will aid in the careful selection of materials for both school and public library patrons if these tools are not readily accessible through other sources such as the district media center or public library system headquarters.
- \_\_\_ \_\_\_ 31. The selection policy will provide sound guidelines for preventing censorship of materials and for building a collection which meets the needs of the patrons of the combined program.

YES NO

- 32. The available collection and attendant equipment will be broad enough and of such quality and quantity that they adequately meet the needs of both school and public library patrons.

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- 33. The materials and equipment in the library will be accessible to all patrons at all times that the library is open.
- 34. The selection process will encourage involvement of persons who desire to recommend materials for inclusion in the collection.
- 35. All materials purchased for the combined library will be cataloged and classified in the same way.
- 36. Concerned groups, including professional library staff members, will work with the architect during the planning phase and throughout construction or remodeling to establish a physical facility adequate enough to accommodate activities commonly associated with school and public library programs.
- 37. The combined program will be located on a site which provides a maximum amount of access to both school and public library services.
- 38. The facility will have adequate seating and physical space to accommodate comparable public and school library programming simultaneously.
- 39. A community meeting room will be available for use of community members other than students during school hours.

YES NO

- \_\_\_ 40. The library will be located in a place that will permit its use during hours when school is not in session without endangering the security of the school.
- \_\_\_ 41. There will be separate entrances for students entering from classrooms and other parts of the school and for public library patrons with direct access from the street or parking lot.
- \_\_\_ 42. There will be a highly visible sign marking the combined site as a public library.
- \_\_\_ 43. The facility will have a seating area set aside exclusively for the use of adults.
- \_\_\_ 44. There will be separate restroom facilities marked for students and for adults.
- \_\_\_ 45. Adequate parking for community members desiring to use the combined library will be located nearby or adjacent to the library in an area which has appropriate security and lighting.
- \_\_\_ 46. Public transportation to the library will be available during hours that the library is open.
- \_\_\_ 47. Cooperative services from various other library agencies, i.e., state library, district media center, regional resource centers, will be available to the combined program.
- \_\_\_ 48. A planning phase of sufficient duration to establish a firm foundation for the program will precede the opening of the combined library.

YES NO

- \_\_\_ 49. Developmental funding is available during the planning phase of the combined program to support activities ranging from architectural negotiations to postage.

DIRECTIONS FOR EVALUATING RESPONSES TO THE CHECKLIST

In order to determine whether or not a community should proceed with its plans for establishing a combined library program the findings, conclusions and recommendations from Phase I of the State Library of Florida study of combined programs should be used as a guide when evaluating responses to the checklist. Through this procedure community members with the assistance of professional library personnel can compare the elements which are present or lacking in their situation with those in successful combined programs. This should give strong indications of whether the combined program presents the best way for providing adequate or improved library services for student and community members. It should also allow community members to identify potential problem areas which may prevent the combined program from achieving the desired results in a particular locality.

Summary of Major Findings Related To Combined Programs<sup>2</sup>

General Information

In the successful programs:

1. A separate area was set aside in the library exclusively for adult use.

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<sup>2</sup>These findings, conclusions and recommendations are the result of a national study of combined school public libraries conducted as part of a State Library of Florida study in 1977 to investigate the factors which brought about the success or failure of this type of program. The title of this study is A Study of the Combined School Public Library: Phase I by Shirley L. Aaron and Sue O. Smith.

### Planning

In the successful programs:

1. There was much community involvement in and commitment to the decision to have a combined school public library.
2. Citizens, the public library board, the school board and other elected governmental officials participated in the planning of the program.
3. A single board representing the concerned groups was established and assumed the responsibility for governing the library.
4. A formal written agreement was adopted between the parties involved which carefully defined the duties of each party.
5. A head librarian with the required expertise and commitment to the concept was selected.
6. A location suitable to both school and public libraries was chosen.
7. Professional library personnel and others planned with the architect throughout the development and construction of the facility.
8. A continuing effort was made to get people to consider the combined program as an integrated whole rather than as separate school and public library programs operating in the same facility.
9. The planning phase lasted three or more years.

### Legal Jurisdiction

1. General library laws or legal rulings allowing exemptions to existing state statutes provided the legal basis for combining libraries.
2. Formal written agreements dealing with funds, materials, equipment, program, personnel, facility construction, maintenance and provisions for terminating the contract were developed in the successful program.

### Financial Data

1. Both school boards and public library boards contributed funds to the successful combined programs.
2. There was no documented evidence that this organizational pattern was more economical than separate programs.

### Purchasing, Processing and Organizing Materials

1. Materials and equipment were purchased centrally through the public library or the school purchasing department depending on the source of funding.
2. In one successful and in four unsuccessful programs, materials were processed by two different centers causing inconsistent subject headings and classification numbers.

### Selecting Materials

In the successful programs:

1. There was much emphasis on working systematically towards achieving a well balanced collection to support school and public library use.
2. A selection policy had not been developed specifically for the combined programs.
3. Anyone who desired to participate in the selection of materials could recommend titles to members of the library staff.
4. The final authority for selection of materials was held by the library staff.
5. No restrictions were placed on materials selection.

### Circulation of Materials

In the successful programs:

1. Materials for children and adults were shelved in separate areas but young adult materials were treated in a variety of ways.
2. There were no restrictions on materials that children, young adults and adults could check out or examine in the library.
3. Circulation procedures relating to audiovisual materials varied.
4. Analysis of circulation figures indicated that there was an increase in the number of materials circulated in successful programs, but there was a corresponding circulation decrease in unsuccessful programs.

### Collection

In the successful programs:

1. The total number of volumes owned by the library ranged from



approximately 1 to 8.7 books per person compared to 0.3 to 3 books per person in the unsuccessful programs.

2. The combined program subscribed to over 160 magazines and at least ten newspapers of interest to various age groups.
3. There was little duplication of material because of the different requirements of school and community users.
4. Savings were said to result from access by other community members to audiovisual materials which were part of the school collection. However, materials were often not appropriate for the adult user.

### Operation and Programming

In the successful programs:

1. Access to the combined program was provided to all community users during library service hours.
2. At the successful sites approximately 30% of staff time was spent working with students. In the unsuccessful programs this figure rose to 60 to 80%.
3. The advantages of the combined program to students and teachers were more resources, more services and an increased number of professional staff members.
4. In one successful program approximately 30% of the staff time was spent on adult programming exclusive of time spent on reader's advisory and reference service. However, in all other sites very little time was spent on programming for adults.
5. One successful program increased the time spent on adult programming. All others devoted a smaller amount of staff time to this service than in the previous year.
6. Advantages offered to adults in successful programs were extended hours and wider range of materials.
7. Two disadvantages of successful as well as unsuccessful combined programs were that groups from other schools visited the libraries infrequently, and that there was a lack of programming for young adults.

### Personnel

1. There were more professional and clerical library personnel to serve community members in the successful programs.

2. In each of the successful programs a professional librarian was employed to offer direction and supervision. She was hired specifically because of her professional training, expertise and personal commitment to the concept.
3. Professional librarians in the successful programs served both students and community members.
4. Problems resulted in programs where professional school and public library personnel had different job classifications, salary schedules, holidays, annual leave days and vacation. Clerical personnel in these programs experienced the same problems.

#### Site Characteristics

1. The size of the facility in the successful programs was at least 2000 square feet or 12 1/2% larger than in the unsuccessful programs.
2. Separate entrances to the library were available for adults and students.

#### Cooperation

1. Successful programs relied extensively on cooperative services to strengthen their libraries. These services were obtained in large part from system level centers.

#### Opinions

In the successful programs:

1. The personnel felt that the library had reached its expected level of use.
2. Five common elements were emphasis on publicity, community involvement and interest, personality and level of commitment of the head librarian, adequate funding and the ability of the school and public library boards to work closely together.
3. A problem identified by personnel was that the lack of adequate staff time to provide needed services curtailed the ability of the library to serve both community members and students effectively.
4. Another problem identified by personnel was the continuing intense pressure on the library staff to provide the broad range of services needed by school and other community members.

5. Library personnel and other community members were committed to the concept of combined programs.
6. The activities offered were more evenly distributed between students and community members.
7. Library personnel anticipated spending a greater amount of money for the same level of library services which would be provided in separate school library and public library programs.

In the unsuccessful programs:

8. Adults seem to regard the combined programs as a school library program and they hesitated to use the library for that reason.
9. Sites tended to have more school than community-related programs. Even so, persons interviewed in three of these programs felt that this organizational pattern discouraged the development of adequate school library media programs.

#### Conclusions of the Study

Careful analysis of the data gathered from the study led to two major conclusions. These conclusions were based on an evaluation of the ability of the combined program to provide improved library service in various settings with different levels of library resources available.

First, it is unlikely that a community able to support or now supporting separate types of libraries will offer better school and public library service through a combined program because the combination of factors required to promote a successful combined program seldom occurs. When many of these factors are present, it still appears more difficult to provide adequate services through this organizational pattern because of 1) the additional demands on the library staff, 2) the need for more staff and resources, 3) the differing program and service needs of various segments of the population, 4) the political obstacles of dealing with different governmental entities, and 5) the dissimilar physical requirements for the location and construction of the facility.

Second, when a community is unable to provide minimum library services through separate facilities, and no option for improved services through system

membership exists, the combined program presents a possible alternative to limited or non-existent services under certain conditions. However, communities searching for a cheaper way to provide better library service should be aware of financial data gathered in this study. These indicate that there is no documented evidence that economy results from this organizational pattern. Further, there was a definite feeling among many of the professional library personnel interviewed that a combined program offering adequate library service generally costs more than the same level of service in separate institutional settings. The combined program is also more difficult to implement successfully. Some of the major reasons for the additional costs may be: the reduced level of use of library services by community members and students from other schools because of the location of the combined program; the need expressed by adults for an area exclusively their own in the library which means the cost of additional space; and, the nonduplicative nature of the programming for both students and other community members eliminating the possibility of cutting staff and collection. Therefore, communities with limited resources who are considering this approach should not select the combined program as a means of improving library services unless: first, implementation of the concept allows the hiring of professional library personnel where no such position(s) previously existed; second, this alternative provides a means of strengthening resources available in the community; third, that an adequately planned program of services to meet both public and school needs is developed and implemented; and, fourth, that a systematic evaluative procedure is used on a regular basis to determine the status of the program and provide for future direction.

Recommendations

Based on the findings of the study, the following recommendations were made:

1. Planning for library services ideally should take place within the context of planning for total community services.
2. Communities should seek to provide improved public library service through public library system membership. School library service should be strengthened through the establishment of district media services to support library media programs in individual schools. In communities where this is not possible, consideration of combining small independent public and school libraries should occur only if the conditions given in the conclusions of this report are met.
3. Governance should be legally defined by formal contracts among the involved governing authorities. These contracts should clearly identify the responsibilities of each governing authority and provide for equitable division of property should dissolution occur.