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The Impact of School District Mergers on Library Media Programs in Selected Iowa School Districts

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Abstract

With the current trend Iowa school districts whole-grade sharing (WGS) with another school district followed by merging, the author examined the impact of such reorganization activities on library media programs in selected school districts. The case study approach was utilized to examine five districts. The author believed that changes occurred as a result in library media centers with most change discernible at the time WGS commenced rather than at the time of full merger. The first hypothesis was supported by evidence of change in library media centers in the areas of facilities, personnel, collections, finances and library media services. In most cases, the major changes did occur when WGS commenced, as the author had predicted. The author further contended that library media programs in the smallest of the districts involved would be impacted the most. While evidence indicated library media specialists were not involved in the initial processes of reorganization, the study indicated that the level of involvement had a corollary with the library media specialists' overall attitude toward the reorganization process and satisfaction level with subsequent changes which occurred. Recommendations from library media specialists involved in the process of reorganization which may assist others in achieving program improvement when experiencing reorganization are included.

The Impact of School District Mergers on
Library Media Programs in Selected
Iowa School Districts

A Graduate Research Paper
Submitted to the
Division of Library Science
Department of Curriculum and Instruction
in Partial Fulfillment
of the Requirements for the Degree
Master of Arts

UNIVERSITY OF NORTHERN IOWA

by

Sandra Huemann-Kelly

April 12, 1994

This Research Paper by: Sandra Huemann-Kelly

Titled: The Impact of School District Mergers on Library Media
Programs in Selected Iowa School Districts

has been approved as meeting the research paper requirement for the
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Chapter 1

Introduction

In the late 1980s, the state of Iowa saw a dramatic increase in the number of school districts merging and consolidating. Not since the 1950s had the total number of districts decreased so dramatically over such a short period of time [Iowa Department of Education. Bureau of School Administration and Accreditation, 1993]. The author, who works in a district which has recently undergone such consolidation, became interested in the impact on library media programs in those school districts which participated in whole-grade sharing (WGS) arrangements followed by full consolidation with another district.

Various factors have led to the increase in mergers and subsequent decrease in number of school districts: economic factors such as the revised method of calculating state support for schools, population trends, aging buildings requiring substantial financial commitments to repair or replace, and new ideas about what programs schools should offer their students. Guy Ghan (1993), a consultant with the Iowa Department of Education, expects the

current reorganization activity to continue beyond 1995 with school organization stabilizing by 1998 or later (p. 2). As of the 1993-94 school year, the Iowa Department of Education (1993) reports the number of school districts is 397, with 358 districts operating high schools. When the 1993-1994 statistics are compared with the 1984-85 school year when there were 438 districts, with 437 of them operating high schools, the amount of change that has already occurred becomes obvious. With several mergers already approved to become effective July 1, 1994, the number of Iowa school districts for the 1994-1995 school year is projected to be 393 or lower (p. 21).

Library media centers are integral to schools. It was assumed that changes occurring in the school building, school district and larger school community would impact the library media center and programs. The level of involvement of library media specialists in these mergers was also examined to determine if there were specific steps which yielded smooth transitions and enhanced library media services.

In addition, some recently merged districts are considering further merging. Since additional mergers appear inevitable, it was

deemed to be an appropriate time to examine the impact of these changes on library media programs.

Purpose

The purpose of this case study was to investigate the range and degree of change in library media programs in recently merged school districts. The author hoped to better understand the impact of merging on library media services, facilities, collections, staffing and financing. Since library media specialists (and other staff members) are generally not actively involved in the decision-making process prior to WGS or merging, the results of this study may prove useful to districts considering such sharing and merger agreements, to library media specialists employed in districts involved in such agreements and to other educational practitioners interested in the impact of change on specific programs.

Ghan (1992c), consultant on mergers in the state of Iowa, depicts the pre-WGS and pre-merger planning and decision-making as strictly involving school boards and citizen committees. Once a decision has been reached or a vote is final, staff members are involved in planning for the implementation of the decision.

Research Problem

Preliminary research questions centered on the following areas of impact: facilities, personnel, collections, finances and library media services. A number of relevant questions surfaced in relation to these areas of inquiry: (a) Did mergers necessitate the closing, relocation, or expansion of library media center facilities? (b) How did mergers affect the personnel of the library media center? (c) What impact occurred in the respective collections? (d) How were the library media budgets of merged districts affected? And finally, (e) How were library media services to students and teachers affected? These questions, in an expanded form, provided the framework for the data to be gathered as discussed in the Methodology section which follows.

The author believed the data would show that changes did occur, and the resultant changes equalized conditions in the two merged districts. In particular, for the smallest districts, the author believed the net result would be a marked improvement in the area of library media services including, in most cases, expanded facilities and services. In addition, as Ghan (1992b) suggested in a discussion of recent consolidations, this researcher predicted that

the study would show discernible change would be more evident at the inception of WGS than at the time full consolidation became effective. In essence, this researcher proposed that the successful WGS contract sets the stage and in many cases is a stepping stone to the full merger of the districts. The author also contends that the input of the library media specialists involved has not been actively solicited nor fully utilized in the planning stages of WGS and mergers.

Limitations

This case study's main emphasis was on school district reorganization activities during WGS and merging, not on school restructuring initiatives which are part of school improvement programs. Further elaboration on the distinction between reorganization and restructuring follows in the review of literature.

The primary constraint of this study was the myriad of sizes, compositions, and available programming in Iowa public schools. The risk of producing comparisons of unequal entities was great. It was hoped that predictive patterns would emerge that could prove useful for comparison purposes in districts at various points in the reorganization process. The fact remains, however, that even highly

similar districts are unique.

The library media services and programs were compared over time. The purpose of this study was not to make qualitative judgments but rather to report and analyze what existed in the periods prior to any sharing or merging, during WGS, and following merging. Assessment was made to determine if and when changes in the programs and services occurred, as well as what the perceived and documented impact of those changes was on programs, facilities, budgets, and staff.

One criterion used in selecting the districts for this study limited the study to mergers that have already taken place. Although four additional mergers were already approved for the 1994-95 school year, and several merger votes are pending at this time, this researcher believed by limiting the subjects to those mergers within the past five years (1989-1993) valid pre- and post-merger comparisons could be made.

Since whole-grade sharing was assumed to have preceded all of the selected mergers, this transition period was also compared. Future mergers, with more precedents available, may be expedited by a shorter (or nonexistent) whole-grade sharing period.

Definitions

School sharing arrangements documented across the state included athletic, superintendent, moderate, and whole grade sharing (Ghan, 1992a). In the same document, Ghan defined *moderate sharing* as ". . . students and teachers moving back and forth for a few subjects and services" (p. 3). For the purposes of this study, *whole-grade sharing* (WGS) involved two or more districts sharing full grade levels. As reported by the Iowa Department of Education (1992a), agreements ranged from one district receiving all students in just one grade level from another district to a district receiving nine full grade levels. The most common arrangement employed by districts was sharing secondary grade levels in one high school.

Several general patterns were common in sharing arrangements. Whole-grade sharing generally led to reorganization or further investigation of other sharing options. There were some instances where the sharing of superintendents existed in isolation of other sharing arrangements although it was frequently a precursor to additional sharing arrangements and ultimate mergers. Ghan (1992a) depicted a typical pattern with superintendent sharing preceding or commencing simultaneously with WGS (p. 3). Ghan (1993) further

defined the WGS agreement as essentially "a business contract" with the parameters and specific time limits defined as well as the financial terms included (p. 6).

In addition, multiple district sharing arrangements of many configurations also existed. School sharing appeared to mirror similar resource exchanges in the state. In general, according to David Vestal of the Iowa Association of Counties, the current trend in Iowa is to look at sharing arrangements in numerous academic, business, and municipal settings in order to share services and control costs (Boshart, 1992, p. 6A).

In order to understand how WGS relates to consolidation, it was important to understand what districts hoped to accomplish in their sharing arrangements. Interest in arranging sharing agreements was initiated by the school districts themselves in many cases, in an effort to improve their programs and their chances of survival. "The boards and citizens of many districts want more programming and services which are expected to come with increased enrollment" (Ghan, 1992a, p. 5). State financial incentives also made sharing choices more palatable as well. Recent state mandates which may be difficult, if not impossible, for very small districts to comply with

also spurred the activities related to reorganizing school districts.

The purported advantages of WGS are (a) the ability to offer more programming and services, (b) the ability to take advantage of state fiscal incentives for reorganizing at this time, and (c) the ability for very small districts to survive by aligning with larger districts (Ghan, 1992a, pp. 5-6). Kevin Brummer, a principal in a district involved in WGS, concurs by saying that "whole-grade sharing has greatly enhanced . . . curriculum offerings" (Jackson, 1990, p. 17). Questions such as those posed by members of three school boards discussing merger options were relevant to most recent mergers in Iowa: "How can we continue to provide the type of education our students deserve? Can we do it better together?" (Bartusek, 1993, p. 10).

A *merged district*, for the purposes of this study, was one which had moved from WGS (with one other district) to full consolidation (with the same district) following a legal and binding vote by the citizens in the districts involved. According to Ghan (1990), when successful, the consolidation process will produce a new district, a new school board, new boundaries and a new tax base among other changes (p. 101). It was assumed such changes would affect all

aspects of the school districts' programs — including the library media program.

Chapter 2

Review of Literature

There exists a body of information about school reorganization pertaining to the current and earlier periods of activity both in Iowa and around the country. The earlier material was useful in establishing how the current reorganizations differ from the ones in the past in terms of impetus, goals, incentives, and acceptance. Reports from other areas in the Midwest region provided some parallels since the combination of a declining rural population, large numbers of school districts (in ratio to population and area), and state financial incentives and fiscal formula revisions were also found to some degree in nearby states such as Michigan, Illinois, Nebraska, Minnesota and Wisconsin (Ghan, 1991). In a discussion of the similarities of other nearby states found in the same document, Ghan cited an article from a Minnesota newspaper relating the closing of a high school and the general conditions of the state: "A reader could barely distinguish the Minnesota activities from those in Iowa, other than by the names of the towns" (p. 3).

Dr. William Lepley, former Department of Education Director, as

cited in Larson (1992) reported ". . . that about 55 percent of Iowa's school districts account for only 18 percent of the state's total enrollment" (p. 8). Thus, contended Lepley, the current reorganizations are necessary for a more realistically affordable number of districts in the state (p. 8). The demographic shift of Iowa school districts was further documented in an official Iowa Department of Education (1993) document where comparisons were available of the distribution of school district sizes over time. For example, it was noted that in the 1985-86 school year there were 52 districts with under 250 student enrollments (compared to 43 districts of comparable size for the 1992-93 school year) or even more dramatic depictions of the shift occurring when all the districts of less than 1,000 students are compared in the same two school years: 333 for 1985-86 and 308 for 1992-93 (p. 23)

At the "Rural Education in Iowa Conference", several papers were presented depicting the delicate balance rural schools sought to achieve by sharing arrangements and mergers. Dr. Norman Boyles (1990), a presenter at the conference, suggested that restructuring of all types has two primary goals: 1) fiscal feasibility and stability, and 2) academic soundness (p. 93).

The "Rural Education in Iowa Conference" conference also highlighted the importance of library media specialists and library media programs to rural schools overall. Distance learning options, access to resources not otherwise available to rural students (via on-line services, computer and CD-ROM data bases) and other technology areas are critical to the survival and continued excellence of schools in Iowa (Costello, et al., 1990). These areas of technology, instructional delivery and access are generally in the realm of library media specialists' instructional role.

Also useful to the author in attaining a better understanding of education in small, rural districts were sources which summarized the conditions which frequently led to consideration of merging and the sometimes compelling arguments for not merging (Nachtigal, 1992; Stern, 1992). The typical arguments against merging, such as lower pupil-teacher ratios, higher participation and achievement levels at smaller schools, and the loss of athletic teams and community identity when merging, provided insight into some of the fringe issues of consolidation and the intensity of emotions that often accompany discussion and decisions relating to the dissolution and consolidation of school districts.

Along with information on school mergers, an abundance of information exists on school reorganization as it relates to *school restructuring*. Ghan, in a paper included in Jackson's (1990) monograph, defines the terms "consolidation", "merger" and "reorganization" as being synonymous (p. 101) and in further discussion, places the actions of reorganizing, dissolving and whole-grade sharing under the term "school restructuring". To make a distinction, *school restructuring*, as the term is currently used in relation to Iowa school mergers, implies intentional program revisions, modification of district regulations and conversion to outcome or performance based student assessment. This study did not address the role of school restructuring initiatives which recommended consolidation as part of school improvement programs. The primary focus of this study was reorganizations motivated by the need for some school districts to align with nearby comparably sized or larger districts for economic and academic reasons.

The available information on ways in which school library media programs are impacted by school mergers was very limited. Some documentation existed of the relationship of adequate funding and staffing and the quality of library media programs. Most recently

the results reported in The Impact of School Library Media Centers on Academic Achievement (also referred to as the "Colorado Study") by Lance, Welborn and Hamilton-Pennell (1993) documented impressive positive correlations between the size of a library media center's staff and collection and academic achievement (p. 92). This study recommends a "minimum threshold" of library media center staffing as *one full-time library media specialist and one full-time clerical* (Transparency 11). In addition, the "Colorado Study" documented that library media expenditures also impact academic achievement (p. 92). Since economic motives are premier in most consolidation efforts, it was assumed that library media programs would be more fully funded for at least one of the merged districts following consolidation. When enrollment declines, school boards may eliminate personnel and cease purchasing books, equipment and supplies (Chisholm, 1983). As would be expected, the strain on personnel in small, rural districts was likely to be felt in the library media center as well. Ghan (1992c) mentioned the improvement of library media center facilities and services as an anticipated benefit for many smaller districts that merge. In assessing the benefits of a three-district sharing arrangement,

Connie Maxson, superintendent of one of the districts involved, commented that opportunities had been expanded for students K-12. In particular, Maxson noted an expanded library media center as a primary benefit for an elementary school in her district (Bartusek, 1993, p. 11).

In addition, at least two documents from the Iowa Department of Education, The Annual Condition of Education Report and Plan for Progress in the Library Media Center PK-12, compile statistics or make recommendations based on school district and school size. In the former, statistics are compiled based on district size categories of less than 250 students, 250-399, 400-599, 600-999, 1,000-2499, 2500-7,499, and over 7,500. Although the size categories do not exactly match the size categories of this study, comparisons were made based on groupings of "smaller" versus "larger" districts in a general sense. For example, the number of teaching units offered in all core subject areas (English and language arts, mathematics, social studies and science) and foreign language were below the state average for all schools with enrollment under 1000 (p. 31). Statistics of this type give credence to the argument that course offerings may indeed be limited by a school's size.

In Plan for Progress, quantitative recommendations are presented for minimum and desired levels of staffing for school library media centers. Again, the school size categories used do not match the Iowa Department of Education's annual report or this study's which are breakdowns of *district* sizes. They do, however, roughly parallel both in distribution as the smaller districts tend to have the smaller schools as well. In Plan for Progress school sizes are divided as follows: up to 250 students, 251-500, 501-750, 751-1,000, 1,001 -1,250, 1,251-1,500, 1,501-1,750, 1,751-2,000 and over 2,000. As recommended in both the earlier cited "Colorado Study" (Lance, et al., 1993), and in Information Power (ALA, 1988), Plan for Progress (Buckingham, 1992) states the need for both professional and support staff, not professional or support staff; a distinction often compromised as a cost-saving measure. In addition, the minimum recommended school library media center staffing for any school (regardless of size) is one full-time library media professional and half-time equivalent support staff (p. 11, 20).

Chapter 3

Methodology

The case study method was chosen because, according to Busha and Harter (1980), by design it allows for compiling comprehensive data on a phenomena utilizing a variety of data-gathering methods and tools (p.151). In addition, the case study method is well-suited to phenomena (such as school mergers) which are essentially contemporary events (rather than historical) for which variables and outcomes cannot be manipulated (Yin, 1984, p. 19-20).

Selection of School Districts

Districts were selected for the study according to the following criteria:

1. The district had fully merged within the past five years (1989-1993) and the merger was effective by July 1, 1993.
2. The district was the result of two (but not more than two) distinct districts combining into one. Specifically, earlier mergers or absorptions may have taken place, but not within the 1989-1993 time period.
3. The two districts had a WGS agreement with one another prior to full merging.

4. To the researcher's knowledge, the newly merged district was not pursuing further merging or sharing arrangements at the time of the study.
5. The districts selected for the study did not include the district in which the researcher was employed.

Selection of the school districts for this study was based on data from the Iowa Department of Education (1992, 1993) for all superintendent and WGS agreements and all passed and pending school district merger votes. A total of 35 school districts initially qualified for the study using the first criterion alone. One district was eliminated from consideration because its merger was involuntary and, therefore, not representative of a typical recent merger. Adding the second criterion eliminated one district which was comprised of three (rather than two) merged districts. Applying criterion three eliminated two districts which did not have whole-grade sharing prior to their merger. In addition, six of the remaining school districts were eliminated from consideration for this study using criterion four, as they were actively pursuing further sharing and merger arrangements at the time and could not be considered fully merged. When criterion five was added the remaining eligible

districts totaled 24.

Of the remaining 24 districts, five districts were selected for participation in the study. The 24 school districts were stratified by three post-merger enrollment size parameters: less than 500 students, 500—1000 students, and over 1000 students. Four districts were in the less than 500 category, 15 in the 500—1000 category and five in the greater than 1000 category. In order to represent the approximate size distributions of recently merged districts in the state, three districts were randomly selected from the 500—1000 category in the stratified samples, and one each from the other two size categories. A total of five merged districts was, therefore, selected for further study.

Qualification of Study Subjects.

Using information available from the Iowa Educational Directory and Area Education Agencies serving the districts selected for the study, a total of 31 questionnaires with cover letters (Appendixes A—F) were sent on November 19, 1993, to personnel in the five selected school districts as follows: superintendents (5), principals (16), and library media specialists (10). In order to be considered valid, the school district employee was required to be employed in

either district during *both* the periods of WGS and merging.

Qualifying criteria also required completed questionnaires to be returned from at least one library media specialist in each district *and* at least one each from the principal *or* superintendent. Of the original 31 questionnaires sent, four superintendent questionnaires, twelve principal questionnaires and six library media specialist questionnaires were returned after the first mailing. At that time, it was learned that in two districts library media specialists had retired and not been replaced, and in one district an additional part-time library media specialist was employed although this information was not indicated by available sources. The net total of library media specialists available to participate in the study was, therefore, nine. Follow-up letters were sent to those not responding by December 21, 1993 (Appendix G). Follow-up letters yielded an additional two principal questionnaires. In an attempt to secure the questionnaire data from the two non-responding library media specialists, follow-up telephone calls were made. One additional questionnaire was completed over the telephone, with the form faxed in advance to the library media specialist. Telephone follow-ups and interviews for the purpose of clarifying questionnaire

responses were conducted with participating library media specialists during the period from January 31 — February 3, 1994. The library media specialists were selected for the telephone interviews since the focus of the study was the library media programs. They would be most familiar with conditions in their respective library media center(s) prior to, during, and after WGS and merging. The follow-up telephone interviews (Appendix H), along with questionnaire responses provided the data which document when and if changes occurred, and if they did, how the library media programs were impacted.

Selection of Library Media Program Evaluation Instruments

The evaluation instruments included questionnaires and follow-up telephone interviews to gather quantitative and qualitative data. The primary sources for questionnaire data were personnel employed in the selected school districts during the time period under study, namely the superintendent, principal(s) and library media specialist(s). The telephone interviews with the library media specialists provided qualitative data including elaboration and further explanation of the level of involvement of library media specialists in planning for WGS and merging, which aspects of the

process were successful and which were not, as well as explanatory details related to other questionnaire responses. The study examined the library media centers, their programs, and services for the time periods: prior to WGS, during WGS, and at the commencement of full merging. The comparative data were represented by the following aspects which define Library Media Programs:

1. Facilities: How many library media centers were operating in the two former districts? Did any close? Did any expand? Did any relocate? What grade level configurations were served by the library media centers before and after merging?
2. Personnel: What personnel (professional, classified and/or volunteer) staffed the former library media centers? What staffing changes took place when WGS commenced? When the merger became effective? Did staffing changes, if they occurred, bring the library media center more or less in alignment with state standards and/or recommendations.
3. Collection: What changes, if any, were made when WGS commenced? Were parts of, or entire, collections moved from one library media center to another?

4. Budget: What were the available funds and sources of funding for the former library media centers? What changes in funding levels and sources did WGS and merging result in?
5. Services: Did library media centers in either or both districts expand services to students or staff? What types of changes occurred, considering staffing and budget adjustments?

Suggestions were solicited from the library media specialists stemming from their experience in the WGS and merger process. It was this information, along with the questionnaire and interview data that contributed to the recommendations for library media specialists involved in WGS and merging situations addressed in Chapter 5.

Chapter 4

Analysis of the Data

The quantitative data were tallied for comparison purposes for the periods of WGS and merging. The quantitative data were not analyzed to determine the full statistical significance of the change that occurred, but rather to establish what changes occurred and when they occurred.

The questionnaires and follow-up telephone interviews provided a composite answer to the questions initially posed. Many of the items in the questionnaires required additional information to explain or validate library media specialists' responses. The data were analyzed to determine if common trends existed for the districts in the study. Notation, discussion, and potential explanations are included for any phenomenon that occurred in *all* districts in the study. Phenomena that occurred infrequently were assessed to determine significance to study. As available, feasible explanations for the presence in one instance and absence in all others is presented.

Data gathered from personnel in the five merged districts indicated that the two districts that merged to become District A

each had a K-12 building before WGS commenced. At the time of WGS, grades K-12 were shared between the districts; one building housed K-4 and 9-12 for both districts and one building housed 5-8 for both districts. Following the merger, the configurations remained the same as established during WGS.

In the two districts that eventually merged and became District B, one district had two buildings: one K-6 and one 7-12. The other district which merged into District B was a single building K-12 school. At WGS, grades 6-8 and grades 9-12 were exchanged between the districts through WGS at the middle and high school buildings and each district maintained its own elementary building. Following the merger, the grade configurations and buildings remained the same as established at WGS.

The two districts that merged to become district C were a district with a single K-12 building and a district with two buildings (one K-6 and one 7-12). When WGS began, the districts shared students in grades 7-12; grades 9-12 attended high school in the building that also housed K-6 in the former single building K-12 district. Grades 7 and 8 were housed in the former high school of the other district. Two years later, WGS included grades 6-8 at the

middle school and 9-12 in the building shared with the K-5 elementary. The current post-merger configuration is: two K-5 elementary centers, a 6-8 middle school (which also houses one of the elementary schools) and a 9-12 high school.

District D was comprised of a single building K-12 district and a district with 2 buildings (one K-6 and one 7-12) prior to WGS. When sharing commenced, the single building district maintained its PK-5 grades and added all 6-8 students from the other district in its one building. All 9-12 students from both districts attended high school in the second district which also maintained a K-5 elementary building. After the districts merged, the configurations remained the same.

District E is comprised of a former single building K-12 district and a district with four buildings (K-2, 3-5, 6-8 and 9-12). At WGS, the single building K-12 district sent 6-12 students to the middle and high schools in the second district and maintained a K-5 elementary. The grade and building configurations are the same post-merger as established at WGS.

Table 1 depicts the total number of questionnaire responses received, including those received as a result of follow-up letters.

As the table indicates, 23 questionnaires yielded data that could be used. Data were not available from one superintendent (District D), two principals (one each from Districts A and C), and one library media specialist (District B) who did not return questionnaires after follow-up requests. In addition, three questionnaires were invalid since the employees (superintendent and two principals from District B) were not in either of the districts included in the study. The total for library media specialist questionnaires was adjusted when it was learned that two library media specialists (one each in Districts A and D) had retired and were not replaced.

Table 1

Number of Questionnaires Sent and Returned

Personnel	Sent	Returned	Usable Responses
Superintendent	5	4	3
Principal	16	14	12
Library Media Specialist	11	8	8
Total	32	26	23

Table 2 shows the responses to questions about the impact of whole-grade sharing on library media programs.

Table 2

Impact of WGS on Library Media Program

Respondent	No impact	Little impact	Significant impact
Superintendent	1	1	1
Principal	4	8	0
LMS	4	1	3

Comments added further details about the effect and extent of impact at the time of WGS. One superintendent characterized significant impact as "more student resources and technology." Nine responses indicated "no impact" of WGS on the library media programs of the respondents. If the responses of "little" and "significant impact" are grouped as one set, at least some impact was experienced by the remaining fourteen respondents.

Table 3 depicts responses to level of impact at the time of merging. The comments supplied additional details about the perceived impact on library media programs. One superintendent noted "significant impact" as the change from 1.5 FTE professionals

for the district to one FTE district professional plus three FTE library associates (one in each building). An area of significant impact mentioned by superintendents, principals and library media specialists was increased technology available following the merger.

Table 3

Impact of Merging on Library Media Programs

Respondent	No impact	Little impact	Significant impact
Superintendent	1	1	1
Principal	5	6	1
LMS	5	1	2

By dividing the questionnaire responses into those who noted "no impact" compared to those which indicated some impact (slight or significant impact grouped into one category), it can be seen that eleven respondents indicated "no impact" occurred at merger, and twelve respondents indicated at least some impact was evident at the time of the merger. The differences between the WGS and merger responses are not statistically significant but additional information derived from follow-up interviews, as presented in the

following section, show the impact to be quite marked in terms of impact on student and teacher services, budgets, collections, and personnel.

Several major areas of change were noted by library media specialists; some, but not all, of these changes were acknowledged by administrators completing questionnaires. Examples from each of the areas which define Library Media Programs (facilities, personnel, collections, finances and services) are used to illustrate the types of changes that were identified by library media specialists.

Facilities

Library media centers in Districts A and E were expanded at the time of WGS. In one case, a media specialist reported a building addition in the time period under study, yet the principal of the same building reported "no change" to the facility. Such discrepancies may be attributable to perceptions of what was related to WGS or merging and what would have occurred in any case. In Districts C and D, funds provided as sharing incentives were used to improve library media facilities. In District D, a bond issue passed within six months of the merger vote meant improved facilities.

Personnel

Table 4 depicts personnel data in FTE (full-time equivalency). Questionnaires did not include the area of personnel in the period before WGS sharing began. In districts A and D, WGS and merging meant the loss of professional staff and the addition of support staff. Although this change moved these schools and districts away from recommended levels of staffing at the professional level, comments on questionnaires and in the course of the interviews indicated that the library media specialists involved believed it was a reasonable concession. In districts A and D it meant that all library media centers were open all day every day which had not been the case prior to WGS and/or merging. In one of the library media centers in District B, support staff was added in response to an NCA evaluation. Staffing remained constant in District C throughout the period under study. In the year following the merger, however, three FTE support staff (one per building) and 1 FTE professional were employed in the district. An improvement was noted over prior staffing conditions by a library media specialist in District B because "covering K-8 is significantly easier than covering K-12." Results depicted in Table 4 for District D may be

clarified by noting that after the merger one K-12 library media specialist was employed. Personnel data from one of the library media specialists in District E was not complete. When inquiry was made during telephone interviews, the respondent indicated that the questionnaire was unclear. Volunteer assistance, while used in some library media centers, did not play a significant role in any of the library media centers examined.

Table 4

Personnel: Professional and Support Staff

District	WGS		Merger	
	Prof.	Support	Prof.	Support
A	.5	0.0	1.0	.5
B	1.5	0.0	1.5	0.5
C	1.0	1.75	1.0	1.75
D	.5	.5	1.0	3.0
E	.75	1.0	1.25	2.0

Collections

Library media specialists in Districts D and E reported that collections had to be moved or relocated — in one case more than

once. This is an issue that perhaps caused the most concern for the library media specialists for several reasons. The first issue was the amount of time and energy such relocations require. The procedures used for the relocations varied from a.) those having a plan and funds for extra hours worked by the library media specialist and support staff, b.) moving parts of or whole collections with no compensation or assistance, to c.) relocations that should have taken place but did not.

The second issue in the area of collections was the amount of communication between library media specialists in the buildings and districts involved in collection merging or relocation. In some cases, a joint effort was made to determine which materials belonged in which library media center, in other cases there was no apparent communication or cooperation among the library media specialists. The most common change was the modification of the grade levels of library media centers. This is a somewhat sensitive area, as the library media centers in District E still have, in effect, two high school collections: one in the current high school, and one in the former K-12 school library media center (which now serves as a K-5 elementary building) because the procedures for combining

collections have not been defined and personnel have not been provided the time or funds to complete the job.

Data were not collected on increases or decreases in collection size other than that detailed above. Changes in size of collections mentioned by library media specialists were attributed to merging several library media center collections rather than to procuring new materials.

Finances

Information was not as readily available in the area of budgets and finances as in other areas examined. The data provided by Table 5 were not sufficient to analyze beyond some general observations. It should be noted that only the library media specialists who were aware of their budget figures saw a positive impact from the reorganization process. Others, while noting *increased* numbers of students, did not see increased per pupil allotments reflected in their library media budgets. Another restriction on the usefulness of the available budget figures was the fact that several mergers created K-12 library media specialists with district responsibilities. These library media specialists were more involved overall in the WGS and merger processes and more aware of their

budgets over time than were library media specialists with single building assignments.

Table 5

Budget Data: Pre-WGS, WGS and Merger

District & LMS	Pre-WGS	WGS	Merger
A-1	Unknown	\$1850	\$3250
B-1	Unknown	Unknown	Unknown
B-2	Unknown	Unknown	Unknown
C-1	\$12,600	\$12,600	\$12,600
D-1	Unknown	Unknown	Unknown
E-1	\$9650	\$9650	\$9560
E-2	Unknown	Unknown	Unknown
E-3	\$2600	\$2650	\$2650

Although most library media specialists could not provide budget figures for comparison, many noted that there was "no change" when asked during the telephone interviews. Budgets reported at the time of merger from library media specialists in Districts A and C were district program budgets, not building

budgets. District C also saw significant change in the area of budgets for the year after the merger (the budget for the year following the merger was \$18,900).

In a telephone interview, one library media specialist in District B, although unable to provide specific budget figures, noted that her budget was increased. The increased budget was attributed to a change in administration rather than to WGS or merging.

Services

The questionnaire results showed services to students and teachers were the same or in a few cases expanded in the school library media centers as a result of whole-grade sharing and merging. The library media specialist in District C reported significant expansion of services to students the first year following the merger. No respondents indicated a reduction in service to students (Table 6) as a result of WGS and/or merging. Questionnaire results do not reflect the improvement in services that the library media specialists related in the telephone interviews. Specific examples of improved student services cited were expanded direct instruction, increased access to technology, improved collections, and access to the library media center.

Table 6

Library Media Services to Students

District & LMS	WGS			Merger	
	Same	Expanded		Same	Expanded
A-1		X		X	
B-1	X			X	
B-2	X			X	
C-1	X			X	
D-1	X				X
E-1	X			X	
E-2	X			X	
E-3	X				X

Improved service for teachers (Table 7) included the creation of a library program at one elementary school in District A. Other examples provided in the telephone interviews included increased open hours as a direct result of the increased support staff hired, improved curriculum and planning opportunities for teachers with the library media specialist, and inservice provided by the library media specialist. No services to teachers were reduced. Again, the

library media specialist in District C reported significant expansion of services to teachers the year following the merger.

Table 7

Library Media Services to Teachers

District & LMS	WGS		Merger	
	Same	Expanded	Same	Expanded
A-1		X	X	
B-1	X		X	
B-2	X		X	
C-1	X		X	
D-1	X			X
E-1	X		X	
E-2	X		X	
E-3	X			X

In all districts except District B, the library media specialists also mentioned improved peer relationships with teachers and colleagues. The library media specialists who worked with other library media specialists also reported feeling less isolated and benefitting from increased interaction with other library media

specialists.

Involvement by Library Media Specialists

Questionnaire results, added comments and telephone interviews confirmed that library media specialists were not involved in the early stages of WGS and later merging. Of the eight library media specialists responding, seven reported "little" or "no involvement" in WGS. At the time of merging, one library media specialist reported little involvement and five reported "no involvement." The three who were highly involved were the exception. One reported a high level of involvement at the time WGS began and two reported a high level of involvement at the time of merger. These library media specialists took a very proactive stance in dealing with the changes occurring. As one stated in a telephone interview "I used what I knew and didn't feel used." When the telephone interviews were conducted most library media specialists in centers that were impacted said that they could have been more involved. When the extent of some of the changes is considered — moving entire collections in at least one case, moving a collection more than once, combining collections, increasing student population and shifting grade configurations — it is clear that these changes

affect the library media programs and specialists. It would seem appropriate to include them in the decisions that impact them.

Chapter 5

Conclusions, Recommendations and Summary

Conclusions

The school district personnel who participated in the study reported a wide range of impact on library media programs in their schools as a result of WGS and merging. In general the impact was more observable at schools most directly affected by whole-grade sharing rather than by all schools within the given districts. Those who reported "little" or "no" impact generally were reporting from buildings unaffected by the WGS grade levels. In District A, all grade levels were shared so the effect was pervasive. Districts B, C, D, and E all shared middle and high school students. In nearly all cases the greatest impact occurred at the time WGS commenced — not at the time of the official merger, although the data in Tables 2 and 3 do not fully depict this conclusion. It should be noted that some responses may not be as definitive as they would be in those districts which have been merged for a longer period of time.

As noted earlier, the library media specialist in District C noted little or no change at the time of WGS or merger, but much change took place the first year after the merger was official.

Whether or not a bond issue was passed in the same relative time frame or whether state incentives for reorganization were used to improve the library media center affected perceptions about whether or not a library media program was impacted by WGS or merging or not. The degree of change reported was relative. One library media specialist noted little or no impact from the WGS and merger even though an additional 100 students were in the building with no additional library media center funds allocated.

The one consistent observation about WGS and merging in the districts under study was that each experience was different. The major motivators of money and school program improvement were present, but different impacts occurred with other reasons factored in. In Districts C and D, the merger reduced library media center professional staffing into a single K-12 district position and increased support staff to cover all buildings. When personnel retirement is factored in, it becomes difficult to confirm that the change occurred *because* of the merger or simultaneously with it. Other changes also occurred simultaneously with WGS or merging but were not wholly attributable to WGS or merger. For example, the retirement of certain school district personnel resulted in major

changes in some districts. In one case, the retirement of a principal resulted in the hiring of a new principal who was a stronger advocate of technology. This new emphasis resulted in the addition of new technology during the same relative timeframe as this study. The benefit of increased technology could not be attributed solely to whole-grade sharing or merger.

The expansion of library media centers was, in some cases, facilitated by whole-grade sharing financial incentives. In one merged district, two of three library media centers were remodelled and expanded with funds primarily from sharing incentive money. The library media specialist and support staff were paid for additional time needed to assist with readying newly remodeled library media centers. Other library media specialists were not aware of any sharing incentive money being spent on the library media center or they performed similar relocation activities without additional compensation.

Adding support staff is the reported justification for cutting professional staff. Some superintendents, principals and library media specialists admitted that they did not believe this was necessarily bad in their situation because of an overall improvement

in minimum service as a result of WGS and merging of districts.

Several trends emerged, primarily from data gathered in the follow-up telephone interviews with library media specialists. The process of WGS and merging, with all of the decisions involved before a merger is officially finalized, appears to open the door to the possibility of more change. It was learned during the telephone interviews that District A, which merged a very small district with another small district, is already formulating the direction of their *next* merger. While it cannot be assumed that the next merger will proceed as smoothly as the first, the possibility is already present in the thoughts of school employees and community members as well. District A was not eliminated from the case study considering the selection criteria for participating districts since information about the additional merger was not made public until the final phase of research was being conducted.

As indicated earlier, library media specialists and school personnel other than the building and district administrators, are not generally involved in the early planning stages for these changes. It is apparent from discussions with library media specialists that those who took a more proactive stance fared better and felt better

about the changes. One library media specialist depicted her involvement during the WGS and merger activities as part of her responsibilities as a library media professional.

In Districts A, C, and D where one K-12 library media specialist supervises the library media program following merging, the library media specialists related more involvement in the merger process, more authority given to the library media specialists, and a greater sense of direction in managing the changes. Their perspective also supports increased involvement by library media specialists in viewing their role in the changes as part of their job rather than something that happened wholly out of their control.

Recommendations

The case study format worked well for this study and similar merged school districts could be studied in this manner. Actual site visits would have enabled the researcher to more easily envision the districts under study, although it is not felt that site visits would significantly impact the findings. A slightly larger initial sample would have possibly eliminated the need for such extended follow-up in order to collect enough responses to validly analyze the data.

Several possibilities exist for variations on this study which could yield both interesting and useful results. A further development of questions and hypotheses that relate to the difference in the impact of merging experienced by library media specialists in districts with *one* professional [K-12] versus multiple library media specialists is a possibility. A follow-up study with those districts entering their second phase of merging might yield interesting results. A focus for such a study might be whether library media specialists who have experienced a merger are more involved in subsequent mergers.

Recommendations for library media specialists who are currently in districts with WGS or merge imminent include two primary suggestions to: a) increase awareness of budget areas and concerns, and b) communicate and work with other library media specialists. Library media specialists in Districts C and E mentioned that enrollment increases *should* be reflected in increased per pupil allotments and, in turn, increased library media budgets. This was not always the case, and the library media specialist who knows what the budget is may be better able to defend the need/request for increased funding to support increased enrollment.

Most of the library media specialists interviewed concurred that good communication is imperative to working with central office administration, building principals, staff, and other library media specialists. Good communication is also necessary for working together successfully to make plans for changes to come. If it is not present, typical merger tasks such as dividing, moving, or merging library collections either occur with much difficulty, or as was found in at least one instance in this study, do not occur at all.

Summary

This case study examined changes in library media programs that are assumed to result from the process of whole-grade sharing and merging of school districts. A secondary purpose was related to assessing the level of involvement of library media specialists in the various stages in the process. Questionnaires and interviews provided the bulk of the data for this study. Change did occur, in a variety of ways and to varying degrees in the library media centers represented by the study. There was not always agreement among those employed in the schools as to the level of change, although there was agreement that the changes that occurred had a positive rather than a negative or neutral impact on library media programs.

The study confirmed that the library media programs in smaller districts and schools generally were impacted more in all areas except staffing. Change was most discernible at the inception of WGS rather than the final merger with the exception of one district which saw many major changes in the period following the final merger. It is clear that additional and earlier involvement of library media specialists results in more positive impact on the library media programs overall.

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Appendix A

Sample Questionnaire: Superintendent

Date

Superintendent

Name

School District

Address

City, State, Zipcode

Dear _____:

I am pursuing a master's degree in Library Science from the University of Northern Iowa, and as part of my program I am conducting research relating to school mergers and library media centers. I became interested in this topic after my district merged with a neighboring district. In order to gather data, I am contacting selected school personnel whose districts have recently merged. Questionnaires specifically target changes that occurred in the library media center/program as a result of whole-grade sharing and/or merging of school districts.

The individuals I will be contacting are: superintendent, principal(s), and library media specialist(s). As the data is processed, follow-up telephone interviews may also be conducted as necessary to clarify questionnaire answers. I appreciate your cooperation with this research and hope the resultant report will be useful to schools in various stages of merging.

Please be assured that confidentiality of those individuals participating will be maintained. No persons or districts will be identified by name or location in the final report.

Please return your questionnaire in the enclosed postage-paid envelope by _____ to:

Sandra Huemann-Kelly

Library Media Specialist

School

Address

City, State, Zipcode

Telephone number

Appendix B
Sample Cover Letter: Principal

Date

Principal
School
Address
City, IA Zip

Dear _____:

I am pursuing a master's degree in Library Science from the University of Northern Iowa, and as part of my program I am conducting research relating to school mergers and library media centers. I became interested in this topic after my district merged with a neighboring district. In order to gather data, the enclosed questionnaire targets changes that occurred in the library media center/program as a result of whole-grade sharing and/or merging of school districts.

After I process the questionnaire data, I may be contacting you with follow-up questions if further clarification or elaboration is necessary. I appreciate your cooperation with this research and hope the resultant report will be useful to schools in various stages of merging.

Please be assured that confidentiality will be maintained. No persons or districts will be identified by name or location in the final report.

Please return your questionnaire in the enclosed postage-paid envelope by _____ to:

Sandra Huemann-Kelly
Library Media Specialist
School
Address
City, State, Zipcode

Telephone number

Appendix C

Sample Cover Letter: Library Media Specialist

Date

Name

School

Address

City, State, Zipcode

Dear _____:

I am pursuing a master's degree in Library Science from the University of Northern Iowa, and as part of my program I am conducting research relating to school mergers and library media centers. I became interested in this topic after my district merged with a neighboring district. In order to gather data, the enclosed questionnaire asks questions relating to changes that occurred in the library media center/program as a result of whole-grade sharing and/or merging of school districts.

After I process the questionnaire data, I may be contacting you with follow-up questions if further clarification or elaboration is necessary. I appreciate your cooperation with this research and hope the resultant report will be useful to media specialists in schools in various stages of merging.

Please be assured that confidentiality will be maintained. No persons or districts will be identified by name or location in the final report.

Please return your questionnaire in the enclosed postage-paid envelope
by _____ to:

Sandra Huemann-Kelly
Library Media Specialist
School
Address
City, State, Zipcode

Telephone number

Superintendent's Questionnaire: Page 2

10. In general how would you characterize the impact of merging on the library media programs:

- No change
- Little Change
- Significant changes: list areas of most impact

11. Additional comments regarding library media centers/programs and any aspects of WGS and merging:

Return questionnaire by _____ to:

Sandra Huemann-Kelly
Media Specialist
School
Address
City, State, Zipcode

Principal's Questionnaire: Page 2

9. What adjustments (if any) were made in the operation of the library media center in your building at the time of WGS?

Professional staff: Remained the same
[FTE] Was reduced
 Was increased

+++++
Support staff: Remained the same
[FTE] Was reduced
 Was increased

+++++
Budget: Remained the same
 Was reduced
 Was increased

+++++
Facility: Remained the same
 Was expanded
 Was reduced in size
 Was closed

10. In general how would you characterize the impact of Whole grade sharing on the library media program in your school:

- Significant negative impact: list specific areas below**
 No impact
 Little impact
 Significant positive impact: list specific areas below

Principal's Questionnaire: Page 3

11. What adjustments (if any) were made in the operation of the library media center in your building at the time of merging?

- Professional staff:** Remained the same
 Was reduced
 Was increased

+++++

- Support staff:** Remained the same
 Was reduced
 Was increased

+++++

- Budget:** Remained the same
 Was reduced
 Was increased

+++++

- Facility:** Remained the same
 Was expanded
 Was reduced in size
 Was closed

12. In general how would you characterize the impact of merging on the library media program in your school:

- Significant negative impact: list specific areas below**
 No impact
 Little impact
 Significant positive impact: list specific areas below

Return questionnaire by _____ to:

Sandra Huemann-Kelly
 Media Specialist
 School
 Address
 City, State, Zipcode

Additional comments regarding the impact of WGS and merging on library media centers/programs may be added on the back.

Library Media Specialist's Questionnaire: Page 2

9. Information about your library media center at the time WGS began:

A. School: _____
 B. Grades: _____

STAFF

C. Number of Professional staff [FTE] : _____

D. Number of Support staff [FTE] : _____

E. Were Volunteers Used? YES No

BUDGET

F. Budget for the library media center the last year prior to WGS?

•Local \$ _____
 •Federal \$ _____
 •Other \$ _____
 TOTAL: \$ _____

G. Budget for the library media center the first year of WGS?

•Local \$ _____
 •Federal \$ _____
 •Other \$ _____
 TOTAL: \$ _____

Facility

H. Was this library media center:

- Closed at any point? No Yes If Yes, Date: _____
- Expanded at any point? No Yes If Yes, Date: _____
- Relocated at any point? No Yes If Yes, Date: _____

Services/Activities

I. When you began WGS, were library media services/activities available to students :

- the same (as prior to WGS)
- reduced
- expanded

Library Media Specialist Questionnaire: Page 4

BUDGET**F. Budget the first year of the official merger:**

•Local \$ _____
 •Federal \$ _____
 •Other \$ _____

TOTAL: \$ _____

Library Media Services/Activities**G. When the merger was final, were library media services/activities available to students :**

- the same (as during WGS)
 reduced
 expanded

H. When the merger became final, were library media services/activities available to teachers :

- the same (as during WGS)
 reduced
 expanded

I. In general, how would you characterize the impact of merging on the library media services/activities in your school:

- Significant negative impact
 Slight negative impact
 No change
 Slight positive impact
 Significant positive impact

13. How would you rate the level of involvement you personally had in preparing for merging :

- No involvement
 Little involvement
 Very involved

Library Media Specialist Questionnaire: Page 5

14. If you administered more than one library media center during the time WGS—merging took place, list differences (if any) on how library media centers were impacted by the WGS — Merger. Examples might include Library media centers that closed, staffing changes, in library media centers other than the "home base" discussed in previous questions.

15. You may add comments regarding the pros and cons of WGS and merging on library media centers/programs. Do you have any suggestions for library media specialists currently involved in/or planning for WGS or merging?

Return questionnaire by _____ to:

Sandra Huemann-Kelly

Media Specialist

School

Address

City, State, Zipcode

Appendix G
Sample Follow-up Letter

Date

Title

Name

School District

Address

City, State, Zipcode

Dear _____:

If you will recall, I sent you a survey relating to my research on school mergers and library media centers. To this date, I have not received your survey.

Please complete and return the survey at your earliest convenience, but no later than _____. Should you need another copy of the survey, please contact me at the address or telephone listed on this letter. The data you might supply would be valuable to my study.

Please be assured that confidentiality will be maintained. No persons or districts will be identified by name or location in the final report.

Thanking you in advance,

Sandra Huemann-Kelly
Library Media Specialist
School
Address
City, State, Zipcode

Telephone Number

Appendix H Telephone Interview Questions

Follow-up questions asked of library media specialists:

1. Which district was most impacted from WGS and/or merging?
2. Which level (elementary/middle/secondary) was most impacted from the WGS and/or merging?
3. Compared to what you thought would happen, what actually happened?
4. Would you say that most impact or change occurred at the time of WGS or merging?
5. You mentioned that services to students were (not) expanded by WGS (merger). If expanded, could you give me some examples?
6. You mentioned that services to teachers were (not) expanded by WGS (merger), If expanded, could you give me some examples?
7. What changes occurred in your library media center budget as a result of:
 - sharing incentive money?
 - bond being passed?
 - difference in tax bases in the two merged districts?
 - enrollment increase or decrease and adjusted per pupil allotment?
8. You stated that you were (not) very involved in WGS process
 - Why (not)? or In what ways were you involved?
 - If involved, at what point in the process were you involved?
9. You stated that you were (not) very involved in merger process
 - Why (not)? or In what ways were you involved?
 - If involved, at what point in the process were you involved?
10. Do you have any advice for library media specialists who are in the beginning stages of the WGS/merging process?