

# **INSTRUCTIONAL MEDIA SERVICES**

## **BOND FUNDED PROJECTS**

### **Measures K & R**

## **STRATEGIC EXECUTION PLAN**

### **UPDATE**

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Submitted

by

Esther Sinofsky, Ph.D.  
Director  
Instructional Media Services

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# Bond Funded Projects Measures K & R Updated Strategic Execution Plan

## Instructional Media Services

### Executive Summary

#### Overview

The Instructional Media Services (IMS) Strategic Execution Plan (SEP) is a series of Measure K and R Bond Funded Projects designed to provide greater access to instructional resources that help foster student achievement. These projects align with the recommendations of the Office of the Inspector General's "Report of Audit" Library Plan calling for greater accountability for maintaining information on school library collections. The Plan outlines how Bond dollars have and will continue to provide a more improved library automation system and a balanced collection of library books and resources for new schools.

The SEP will provide detailed information on the status and next steps of the projects to be completed by IMS. The Division of Professional Development & Leadership's Instructional Media Services Branch is presenting the SEP for approval from the Bond Oversight Committee and the Board of Education.





# Bond Funded Projects Measures K & R Updated Strategic Execution Plan

## Instructional Media Services

### **Vision**

Every student will have both physical and intellectual access to information and ideas through quality library media centers that are well-designed, well-stocked, appropriately staffed and automated. LAUSD school library Media Centers will offer services and learning experiences that are an integral part of the instructional program to achieve the Superintendent's goals.

### **Mission**

The mission of Library Services is to support school library Media Centers as they work to improve literacy and academic achievement by providing resources and learning opportunities that enable students and staff to become effective users of ideas and information.

### **Planning and Project Management**

IMS manages the Bond Projects which include the Centralized Library Automation System (CLAS) and the establishment of opening day library book collections for new schools. The management team consists of professionals such as Teacher Librarians, classroom teachers, and technicians with extensive experience in literacy, library policies, and automated systems.

The management team faces a number of challenges in the successful execution of these projects. They include:

- Preparing for changes in actual project costs
- Collaborating with all stakeholders in a timely manner
- Previewing and evaluating vendor proposals submitted in response to the RFP process
- Providing appropriate and equitable library resource collections for new schools
- Ensuring that opening day library books collections meet the needs of diverse cultural interests, individual student needs, and Small Learning Communities
- Aligning library set-up with the changing schedules of new school construction
- Maintaining a consistent and stable existing system (short-term) with ongoing maintenance and support

### **Roles and Responsibilities**

#### **Director, Instructional Media Services**

- Provides guidance and oversight to the Project Management Team
- Reviews project invoices and provides fiscal oversight
- Interfaces with other internal District divisions, external organizations, and the public



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- Presents the Strategic Execution Plan (SEP) and quarterly reports to the Board and Bond Oversight Committee
- Conducts meetings with stakeholders
- Communicates the SEP and progress to stakeholders
- Creates and maintains document controls and reporting
- Directs, reviews, and participates in studies to analyze and evaluate needs and services, material and human resources, feasibility and cost effectiveness, and other aspects of management

### Program Manager, Bond Funded Projects

- Oversees the day-to-day operations of all IMS Bond Funded Projects
- Manages the SEP with strict adherence to budgets, timelines, and quality
- Collaborates and develops recommendations to coordinate projects
- Identifies resources, including library and subject matter experts
- Reviews work products ensuring quality and accuracy
- Manages all communications with LAUSD ITD, vendors and project team
- Reports project status to LAUSD sponsors and steering committee
- Administers change orders
- Updates detailed project plan and status reports
- Analyzes problems and recommends solutions

### Opening Day Collection Team

- Sets up libraries
- Verifies inventory
- Assists Coordinating Field Librarians with orders for opening day collections
- Validates invoices
- Answers other related library issues/concerns

### Budget Personnel

- Oversee the budget
- Prepare and obtain budget from School Management Services
- Verify budget figures with Fiscal Analyst
- Obtain project funding lines
- Determine budget for each order with Program Manager
- Develop and maintain Budget Tracking Reports



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### Catalogers

- Maintain integrity of CLAS data to ensure smooth integration of opening day collections
- Convert and clean MARC Records
- Create new school reports
- Check vendor disks
- Contact vendor to ensure timely and accurate data import and export of MARC/Bibliographic records
- Edit Cataloging records
- Maintain Authority files

### Customer Support Representatives

- Manage Peregrine (ITD Help Desk) incident tickets in CLAS management queue
- Apprise management on current status of Help Desk tickets
- Support and maintain CLAS
- Reconcile student circulation and student fines data
- Analyze inventory and circulation data loads with errors
- Troubleshoot connectivity issues
- Analyze barcode problems
- Install CLAS at new schools
- Import vendor disks
- Install computer stations, hardware, and software
- Train library personnel

### IMS collaborates with ITD/Applications on the following tasks

- Upgrading software files including critical updates to system files
- Testing scripts of CLAS software
- Maintaining applications to support the goals of IMS
- Troubleshooting computer applications and programs
- Providing operational technical support for CLAS
- Conducting routine general operation maintenance of application
- Advising and providing all technical information for Statement of Work for RFI/RFP Process
- Collaborating with IMS in evaluating vendor proposals for new automated system
- Providing for an ITD Project Manager for technical expertise



# Bond Funded Projects Measures K & R Updated Strategic Execution Plan

## Instructional Media Services



Coordinating Field Librarians setting up opening day collections for new schools



# Bond Funded Projects Measures K & R Updated Strategic Execution Plan

## Instructional Media Services

### Organization of Professional Development & Leadership





# Bond Funded Projects Measures K & R Updated Strategic Execution Plan

## Instructional Media Services

### Projects:

#### **CLAS** (Centralized Library Automation System)

#### **Status:**

To date, the CLAS project has:

- Trained Teacher Librarians (TL's), Library Aides and other school staff on the use of the automated system
- Bought new circulation computers for 452 schools
- Installed schools with a library with the CLAS application
- Bar-coded, inventoried, and catalogued 289 school libraries, totaling 1.5 million books
- Cataloged and standardized records across the District
- Centralized server hardware supported by ITD

CLAS was implemented in 2004 as a tool for school libraries to search, circulate, and catalog instructional materials. It was established as a centralized database for all of the District's library resource materials. The system was selected as the result of a competitive bidding process.

The system has not lived up to District expectations. It has been discovered that the system was never designed to support the number of schools and holdings LAUSD requires. As a result, the District was involved in a lengthy contract dispute with Sagebrush Corporation which was settled earlier this year. Since that time, the software product, Accent, has been purchased by a competing vendor and further development on the product has ceased. However, Accent is still commercially supported by Follett Corporation and the District subscribes to such support.

IMS, in collaboration with ITD and Follett Software Company, have been working to stabilize the system. Improvements have been made to the system over the summer and the CLAS system is currently operational. It is hoped that the system will be in service for the remainder of the 08/09 school year providing for short-term stabilization. ITD and Follett have been working diligently to ensure the system (as-is) will meet the service levels requirements so that schools can perform basic minimal functions such as, searching for books/materials, keeping track of circulated items, and cataloging new resources on a daily basis.



## Bond Funded Projects Measures K & R Updated Strategic Execution Plan

### Instructional Media Services

#### CLAS Next Steps:

Both IMS and ITD recognize the need to replace the current system and are exploring multiple avenues to meet that objective as quickly and economically as possible. The implementation of a new Integrated Library System (ILS) will benefit all K-12 school sites in the following ways:

- Provide data on school library collections District-wide
- Facilitate identification of newer titles needed to meet students' learning needs and special interest
- Allow for greater accountability by reporting of library statistical information related to circulation, collection recency, loss, balance, and size
- Provide information on school site holdings and their status
- Allow for web-based searching
- Efficient uploading and maintenance of the cataloging records
- Provide for more centralized maintenance and support of technology and application, allowing local school staffs to focus on student learning
- Assist in providing information to ensure that all students have access to library resources that meets District library standards

The selection process for a new system has been established. First, the CLAS Advisory Committee (CLASAC) met regularly to document the requirements for the new system. Second, ITD is exploring the feasibility of partnering with other agencies in Los Angeles to leverage their investments in similar technology. Third, IMS is investigating other large school districts and vendors that may have a product that will meet the technical and library requirements of the District.

IMS, in collaboration with ITD, CLASAC, and other District personnel end-users, will be releasing a RFI through the Office of Procurement requesting information from vendors on the performance of their product. A review of the product information will be conducted by a core selection committee composed of Teacher Librarians, Library Aides, ITD, and IMS personnel. After the product information has been reviewed, a Statement of Work will be developed and a RFP will be sent to qualified vendors. Following is a tentative timeline for the selection of a new ILS product:

- |                                |                        |
|--------------------------------|------------------------|
| • RFI release                  | November '08           |
| • Evaluation of RFI            | December - January '08 |
| • RFP release                  | February - '09         |
| • RFP proposals/evaluations    | March – April '09      |
| • Vendor selection             | May – June '09         |
| • Implementation – Pilot Phase | July '09               |



## **Bond Funded Projects Measures K & R Updated Strategic Execution Plan**

### **Instructional Media Services**

A project plan will then be developed establishing timelines including a pilot phase before full implementation. Status updates will be submitted in the Quarterly Reports to the Bond Oversight Committee and the School Board outlining the project's responsibilities and progress. The Office of the General Counsel, Procurement, as well as IMS and ITD will be involved in the contract negotiations with the selected vendor.

#### **Budget Impact:**

- See Bond Funded Projects on Budget pages 15 – 17 of the SEP Update.



# Bond Funded Projects Measures K & R Updated Strategic Execution Plan

## Instructional Media Services

### Opening Day Collections and CLAS at New Schools

Status:

IMS supports the instructional goals of the Superintendent and LAUSD by ensuring new school libraries are not just repositories of books, but media centers where students learn to develop their abilities to locate, analyze, synthesize, and evaluate information, skills needed to become life-long learners.

Currently, all new school libraries opening under Measure K and R are receiving 11 books per seat and receive computers for the circulation station. The goal is to enable the school to reach the State count of 17 books per student. In addition, IMS collaborates with other agencies to ensure new school libraries adhere to the “Report of Finding” specifications:

- Conduct annual reviews with the four contracted book vendors to discuss book specifications and requirements for opening day book collections
- Meet on a regular basis with Facilities to review the library design planning and decision-making process for new and remodeled school libraries
- Provide requested material for the Office of Inspector General, currently conducting an audit of Follett Library Resources, one of the book companies contracted for supplying opening day library book collections to new schools
- Analysis of average number of books per student (BPS) by Local District, May 2008.

Local District	Book Count	Enrollment	Books Per Student
1	1,323,097	105,559	12.53
2	1,088,512	90,150	12.07
3	968,699	74,057	13.08
4	1,060,608	79,597	13.32
5	1,021,844	86,241	11.85
6	777,125	58,990	13.17
7	705,230	70,489	10.00
8	834,425	74,622	11.18
<b>Totals</b>	<b>7,785,420</b>	<b>640,155</b>	<b>12.16</b>



## Bond Funded Projects Measures K & R Updated Strategic Execution Plan

### Instructional Media Services

IMS has been meeting the challenge of setting up and opening new schools with a balanced collection of 11 books per seat on time and under budget. As recommended in the May 2008 Quarterly Report, additional personnel were hired to ensure completion of this project for this school year. The Bond monies expenditures for the following personnel are as follows:

#### Coordinating Field Librarian (CFL) for New Schools

Since the beginning of the Opening Day Collections (ODC) Project, there has been a need for an experienced CFL to perform a collection analysis of books that need to be ordered for each of the new schools. This CFL position:

- Meets with book vendors regarding LAUSD specs
- Reviews and Revises library plans with Architects
- Works with SOTU for furniture selection
- Orders supplies assuring materials available for setting up libraries
- Orders DVDs, periodicals and reference books

A total of 55 new schools were opened by Measure K Bond monies. Over the next three years, 33 schools are scheduled to open.

- Budget Impact: \$111,539 ( Maximum including benefits)

#### Z-time for Coordinating Field Librarians (CFL)

CFL's worked on revising opening day collection lists. Each Local District is assigned a Coordinating Field Librarian to collaborate with school site Library Media Centers. Budget cuts eliminated the CFL's Z-time funding. Z-time enables the CFLs to work during the summer to meet the demands of the Year-Round Schools and finalize the opening of new school libraries. The CFLs visit YRS as part of CLAS implementation. In addition, they set up the new school libraries over the summer. Without this contribution, it would be impossible to have the libraries ready for opening day. The only other solution was to outsource the work which would have had inexperienced personnel shelving and setting up new school libraries at a greater costs. This is not a viable solution.

- Budget Impact: \$156,238 (Maximum)



## Bond Funded Projects Measures K & R Updated Strategic Execution Plan

### Instructional Media Services

#### Stock Worker

A Stock Worker is needed to assist in keeping records of library opening school collections; receiving and inspecting books from vendors; reconciling invoices with book deliverables; inventorying orders; checking and packing orders for shipment; unpacking orders on pallets; supporting CFLs in setting up libraries in new schools.

- Budget Impact: \$58,301 (Maximum)



## Bond Funded Projects Measures K & R Updated Strategic Execution Plan

### Instructional Media Services

#### Budget for Bond Funded Library Projects

#### Measure K Budget (Adjusted Budget as of November 1, 2008)

Instructional Media Services	Budget Projections	% of Budget	Adjustments after deduction of Expenditures to Projects	Actual Budget as of 11/1/08	Percentage of Actual Budget
New School Libraries	\$21,181,900	56%	(7,119,548)	\$14,062,352	37%
CLAS*	\$7,763,683	20%	(893,077)	\$6,870,606	18%
Library Installs/Upgrades	\$908,018	2%	(146,074)	\$761,944	2%
Book Theft Detection System	\$512,282	1%	-	\$512,282	1%
Integrated Library System**		0%	8,500,000	\$8,500,000	22%
Inspection/Test & Acceptance	\$3,835,799	10%	(1,028,194)	\$3,588,259	11%
Contingency	\$477,832	1%	-	\$477,832	1%
Project Management & Support	\$3,320,486	9%	(93,761)	\$3,226,725	8%
<b>Total – Measure K</b>	<b>\$38,000,000</b>	<b>100%</b>	<b>-</b>	<b>\$38,000,000</b>	<b>100%</b>

\* CLAS maintenance for current automated system to end of contract (December 2010) or until deployment of new Integrated Library System, to be funded in Measure K

\*\* Integrated Library System monies encumbered for new automated system



## Bond Funded Projects Measures K & R Updated Strategic Execution Plan

### Instructional Media Services

#### Measure R Budget (as of November 1, 2008)

Instructional Media Services	Budget Projections	% of Budget`	Adjustments after deduction of Expenditures to Projects	Actual Budget as of 11/1/08	Percentage of Actual Budget
New School Libraries	\$32,016,266	60%	1,583,734	\$33,600,000	63%
New Integrated Library System*	\$10,750,000	20%	(7,250,000)	\$3,500,000	7%
Inspection/Test & Acceptance	\$3,423,734	6%	846,368	\$5,300,000	10%
Contingency	\$3,710,000	7%	1,590,000	\$5,300,000	10%
Project Management & Support	\$3,100,000	6%	2,200,000	\$5,300,000	10%
<b>Total – Measure R</b>	<b>\$53,000,000</b>	<b>100%</b>	-	<b>\$53,000,000</b>	<b>100%</b>

\* *New Integrated Library System* budget estimate = \$12M, (\$8.5M from Measure K and \$3.5 M from Measure R)



# Bond Funded Projects Measures K & R Updated Strategic Execution Plan

## Instructional Media Services

### Next Steps Budget Recommendations:

Next Step Requirements	Project Costs	Funding Source	Comments
CLAS Personnel <ul style="list-style-type: none"> <li>• IMS and ITD Program and Project Manager</li> <li>• ITAF</li> </ul>	\$472,000.00	Measure K & R	Project Management needed for management of current CLAS system and for selection process and implementation of new ILS software. ITAF needed for training and Help Desk of current and new systems.
New School set-ups Z-Time for CFL's	\$156,238.00	Measure K & R	IMS certificated personnel needed to set up new school libraries opening during the summer and revise opening day collections.
New Schools Coordinating Field Librarian	\$111,539.00	Measure R	An experienced librarian is needed to analyze library book collections and orders the appropriate materials.
New ILS's System	\$10 – 15 Million	Measure K & R	IMS and ITD both recommend selection of a new system to improve library automation.
Hardware and Equipment for new system	\$125,000.00	Measure K & R	New system needs additional hardware and equipment.
Stock Worker	\$58,301.00	Measure K & R	Person needed to assist in setting up school, inventorying books.