

Values-Oriented Factors Leading to Retention of School Librarian Positions: A School District Case Study

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The number of U.S. school librarians has greatly diminished despite advocacy efforts on the local and national level. This case study investigated the factors that led governing board members in a mid-size urban high school district to retain certified school librarian positions despite a major economic crisis. Data were collected through school district documents and interviews with the district superintendent, a governing board member, the director of finance, a school administrator, and a librarian. Using an organizational decision-making framework, the researcher constructed the following values-oriented themes contributing to the retention of librarians: employee involvement, transparency in communication, trust between district leadership and the governing board, a commitment to the district's core values, and the value placed on the school library program by the district's stakeholders. Findings indicated that practitioners can advocate on the basis of organizational factors that contribute to school librarian retention. Future research should investigate additional school districts' decision-making processes in the retention of school librarian positions. All locations and names used in this study are pseudonyms.

Introduction

This study investigates the factors that led governing board members in a mid-size urban high school district to retain certified school librarians despite the major economic crisis of 2009. In the past several years, the number of school librarians has greatly diminished. Currently, only 60 percent of K–12 public schools in the United States employ a state certified school librarian (American Libraries 2007). In Arizona, the location of the study, only 38 percent of public schools are staffed with a certified school librarian (Kossan 2008).

The Brookdale Union High School District, a mid-size urban district with 15,000 students in grades 9–12, stands out from other Arizona school districts. Brookdale retained certified school librarians in its nine high schools despite a major economic crisis in which led to a cut in approximately 10 percent of its operating expenses. To fulfill mandated budget reductions, other Arizona districts either eliminated or reduced certified school librarian positions. Some districts replaced certified school librarians with paraprofessionals. Other districts eliminated library personnel completely, relying on teachers and volunteers to manage library spaces in schools. The case study of Brookdale provides a window into the decision-making process used to retain

school librarian positions, sheds light on possible future decision-making in the district, and offers implications for future research.

Literature Review

Advocacy for public school library media programs in the United States has gained attention in recent years because of drastic eliminations in school librarian positions and funding reductions in schools and school districts. Recent eliminations of librarians prompted the American Library Association (ALA) to appoint a special Task Force on the Status of School Libraries (ALA 2005). Since the adoption of its report in 2006, ALA launched several initiatives to advocate for a state-certified librarian in every U.S. public school. Resolutions on various aspects of school libraries were adopted by the ALA's policy-making council, and responses to position and funding elimination were developed. In addition, the American Association of School Librarians (AASL) created an Advocacy Toolkit that provided resources for library supporters when faced with possible position eliminations. ALA and AASL's most ambitious school library advocacy activity to date is the improvement of school library activities under the Elementary and Secondary Education Act. These improvements include maintaining dedicated funding for the Improving Literacy through School Libraries program, establishing state goals of having a school library staffed by a state-licensed school librarian in each public school and allowing state and local professional development funds to be used for recruiting and training school librarians (AASL 2010).

Despite the above initiatives, school district decision-makers across the nation continue to eliminate school librarian positions as part of cost-saving measures. Advocacy campaigns do not always influence board members to retain school librarians. For example, despite well-organized advocacy campaigns in Medina, Washington (Whelan 2009), and Mesa, Arizona (Whelan 2008), these districts still chose to eliminate librarians. The unevenness of decisions to retain or eliminate is perplexing; little is understood about why some school districts choose to retain school librarian positions while others do not.

The literature on school library advocacy consists of strategies and techniques for advocacy (e.g., Bush 2007; Hainer 2005; Leverett 2001; Schuckett 2005; Williams 2006) using evidence-based practice as an advocacy tool (Asselin 2002; Braxton 2003; Loertscher and Todd 2003; Logan 2006; Todd 2003, 2006, 2008a, 2008b) and reports of successful advocacy initiatives (e.g., Burris 2006; Giambra 1998; Kenney 2008; Russell 2004). A search of the literature revealed no empirical studies specifically describing *why* or *how* school district decision-makers choose to retain or eliminate school librarian positions. Therefore the study of Brookdale Union High School District's decision-making process in retaining school librarians addresses a gap in the literature in school library advocacy.

Method

The researcher used a descriptive case study approach (Yin 2008). This approach is ideal for uncovering the complex factors that led the Brookdale Union High School District to retain school librarian positions in an economic crisis. Yin describes four applications of a descriptive case study. First, the method can explain complex causal links in real-life decisions. Second, a case study can describe the real-life context in which the decision occurred. Third, it can describe the decision itself. Finally, descriptive case studies can explore those situations in which the decision being evaluated has no clear set of outcomes.

The descriptive case study method was appropriate for examining the multiple perspectives of the board, district personnel, and school librarians from the district observed in this study. The method also was appropriate for examining Brookdale in context. While the outcomes of reducing the budget and retaining school librarians were clear, the circumstances surrounding these decisions were complex and involved multiple stakeholders, thus affirming the appropriateness of the case study method.

To ensure construct validity (Yin 2008) and data source triangulation (Denzin 1984), multiple sources of evidence were collected and analyzed. These sources included financial reports, governing board minutes, and district documents, including the district's core values statement and an explanation of the district's Learning System (see [figure 1](#)). Additionally, using a semistructured format, the researcher interviewed a governing board member and four school district employees: the superintendent, the administrator of finance, an assistant principal, and a school librarian. Participants were recommended by the superintendent and invited by the researcher. The interviews were conducted individually, with the exception of the assistant principal and librarian, who were interviewed together. Participants were given copies of the interview questions. These questions guided the interviews, but interviews were not limited to the written questions. Interviews were audio recorded and transcribed. The researcher read through the entire data set and then analyzed the interview transcripts against each other and the other data sources. Codes were assigned to excerpts from the interviews, board meeting minutes, and other documents. The codes were then grouped into categories. The researcher then read through the entire data set looking for disconfirming evidence or contradictions. Themes were then constructed through the lens of organizational decision-making (Zey 2007).

Context

Brookdale Union High School District is a mid-sized urban school district in Arizona. The 97 year-old district serves 15,000 students through nine high schools and two alternative programs. One Brookdale high school is consistently recognized as one of the country's top 100 high schools in *U.S. News and World Report*. In late 2008, the Arizona economy began to take a turn for the worse. Unemployment rose, and new housing, which is the cornerstone of the Arizona economy, came to a screeching halt. Because of the economic turndown, Brookdale Union High School District administrators expected deep reductions in state funding, as did all Arizona public education decision-makers. Approximately 48 percent of the Arizona state budget supports K–12 education (Arizona Joint Legislative Budget Council 2010). As the state's economy faltered, Brookdale leaders knew that at some point the district's budget would be affected. They began planning in anticipation of being asked to return money to the state to resolve a mid-year deficit.

In January 2009, the district was asked to return \$2 million to the state from its original allotment, which amounted to 3–4 percent of the total district budget. However, at that time, 85 percent of the district budget was encumbered in contractual salaries, so the cuts came from the remaining 15 percent of the budget, which consisted of operating expenses such as utilities, transportation, supplies, and soft capital such as carpet replacement, library books, and vehicles.

To determine and prioritize potential mid-year reductions, the leadership reached out to stakeholders. Each member of the district leadership team, to whom Superintendent Dr. Jane Jones refers as “the cabinet,” visited a school and spoke with the staff there. These district leaders explained the reality of the situation to the school staff and warned that the coming fiscal year would be even worse. At the school sites, staff brainstormed ways to reduce operating expenses. Ultimately the district returned the \$2 million to the state through cuts to operating expenses and soft capital and did not eliminate any noncontractual personnel. One of the largest savings came from reduction of energy consumption at the school sites. The district achieved this through eliminating small appliances in areas other than staff lounges and halting the use of televisions as classroom clocks, among other measures. However, the 2008–9 budget reductions were only the tip of the iceberg. Like all school districts in Arizona, Brookdale expected an even smaller budget allocation in 2009–10. In a communication to district residents in March 2009, Superintendent Jones outlined the potential consequences of current and future budget reductions. She stated,

Like many of our neighboring districts in the [area], we have diligently worked to continue to provide a quality education to every student while maximizing the use of our resources. The district continues to manage its finances with great care. We have not filled positions, purchased equipment or supplies that were not essential and we have conserved energy at every point possible on a daily basis. As we look to the future, we share the most serious concern of all school districts related to what the state legislature may propose as cuts to next year’s budget. These cuts, which could exceed \$13 million for our district, will significantly increase class size, potentially cut programs like band, athletics, and the arts and cause the district to reduce its staff, including teachers.

The district leadership knew that the anticipated budget reduction, possibly \$13 million in the forthcoming fiscal year, would force the district to eliminate positions. Superintendent Jones stated, “If 85% of [the budget is] tied up, and you’ve got to cut \$13 million, and you can’t not provide transportation, and you can’t not pay your electric bill, and you can’t not provide some school supplies ... it doesn’t take long to figure out that you can’t get to \$13 million without touching personnel costs.”

Once again, in early 2009, district leadership reached out to stakeholders to determine how and in what order to reduce costs for the upcoming fiscal year. Superintendent Jones and her leadership cabinet held meetings at each of the district’s nine schools, outlining the potential budget scenario and asking for input from staff. Superintendent Jones explained the mechanism for gathering stakeholder input:

Based on the philosophy that people who are affected by a decision should have some input into the decision, we went back out to the schools and worked with every staff member, and I do mean every staff member: the maintenance department; the clerical staff; instructional aides; teachers; administrators. Everybody on the campus had the opportunity to meet in groups, to learn more about what was happening with the budget, and then to provide input into what should we do. . . . We gave out this list that said, “Here’s what we spend money on. Here [are] your choices. Look at this list, and see if you can’t develop a list of \$13 million worth of cuts,” which was simultaneously enlightening and empowering to our staff.

While conducting information sessions with staff, district leadership provided a caveat for input about potential budget reductions. Leadership would do everything in its power to protect the Learning System. The district’s Learning System ([figure 1](#)) is a continuous cycle of curriculum, instruction, and assessment.

A district presentation (Mesquita 2010) provides the context and importance of the Learning System:

Just like the pieces of a puzzle, the Learning System will not give a complete picture of success when looked at separately. . . . One component of the Learning System is no more important than the other. They are all aligned to the state and national academic standards and are all used to help us strive to make continuous improvements year after year. We are always in a constant effort to improve each aspect of the Learning System so that we can provide the best education possible to all students.

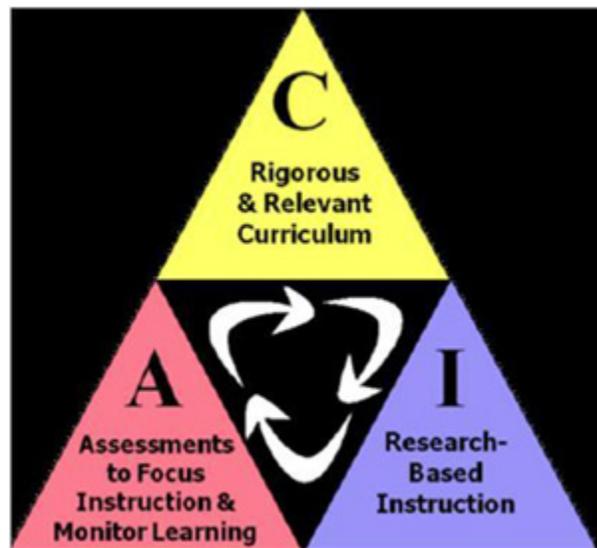


Figure 1. Brookdale Union High School District Learning System

The Learning System, developed and refined over the last forty years (Mesquita 2010), represents a very important focal point in the district. Each person interviewed for this study mentioned the Learning System as a framework for how the district addressed and prioritized eliminations. Superintendent Jones noted that the district would attempt to make cuts as far away from the classroom as possible to protect the Learning System. After the schools met in small groups to determine possible budget reductions, the suggestions were forwarded to the cabinet for analysis. Superintendent Jones estimated that the cabinet spent more than 200 hours collectively analyzing, prioritizing, and adjusting potential budget reductions, which was referred to as “the list.” (The researcher was unable to obtain a copy of the prioritized list of budget reductions.) Simultaneously, the cabinet began a series of conversations with the governing

board about the items on the list. The list amounted to a total of \$13 million in reductions, anticipating that this number was the maximum that the district would be required to cut. However, even in theory, the development of the list was difficult and could not be prioritized in a way that spared all positions. Superintendent Jones explained,

We ... prayed every day that we weren't going to actually have to get to \$13 million. The things at the top of the list ... we figured we could cut \$1 million and it wouldn't be too bad. ... About halfway through the list, it was not possible not to cut positions. Then you have to think, "Okay ... if you have to do it, which positions can you cut?"

In addition to the prioritized list, district leaders attempted to preserve resources by moving expenses into other budget allocation areas. For example, they identified items that could be paid for from federal funds, such as Title I (which provides monies to improve academic achievement of the economically disadvantaged), rather than state allocation. When the state budget was passed on the eve of the new fiscal year, Brookdale Union High School District was directed to eliminate \$8.5 million from its total operating budget for 2009–10. The reductions were made using the prioritized list that was developed over the previous year.

To fulfill the reductions, the district eliminated 120 positions, primarily classified (nonteaching) staff. Included in the classified staff reduction were the library media center aides, leaving the libraries staffed with one certified school librarian and no paraprofessional assistance. The library's book and electronic resource budget also was reduced at each school. There were a number of certified teachers, retired from the district and employed by a lease-back company, who also lost positions. The remaining budget reductions came from soft capital, normal employee attrition, and retirements. While the library programs were affected, the certified librarian positions remained. The rationale for retaining the certified librarian positions was described by Superintendent Jones:

We began to hear news from other districts that they were eliminating [certified librarian] positions ... there were schools across the state that made the decision to eliminate the certified position and keep the support-staff position. It didn't take us long to really come to the decision that we could probably live without the support-staff position, but that keeping the certified position was important to us. It was important for a variety of reasons. ... So we knew we had to keep somebody in [the library], and ... it didn't really take us very long to figure out that the certified position was the one position with the level of expertise that we really needed to have.

In summary, while the school district was faced with significant budget reductions, a well-crafted prioritization process with a focus on the core values and mission of the school district allowed the governing board to make informed choices while maintaining instructional integrity. The following discussion provides insight on the themes constructed through the analysis of stakeholder interviews and district documents.

Findings

Using organizational decision-making as a framework, the researcher constructed several values-oriented themes that influenced the decision to retain certified school librarians at each school. Simon's (1955) administrative model of organizational decision-making is applicable to consequential organizational decisions such as budget reductions. What Simon calls "non-programmed" decisions applies in this case. Non-programmed decisions are complex and non-routine. For example, the norms of school district decision making are influenced by the complex relationship of the district's values and organizational structure (Hinings and Greenwood 1987). Nevertheless, educational organizations share many common cultural practices and tacit decision-making patterns (Greenwood and Hinings 1993; Patterson et al. 2006). These practices and patterns served as a lens through which the following themes were constructed: employee involvement; transparency in communication; trust between district leadership and the governing board; a commitment to the district's core values, including the Learning System; and the value placed on the school library program by the district's employees and decision-makers. Each theme is discussed in the following sections.

Employee Involvement

A cornerstone of the district's decision to retain school librarians was employee involvement in the decision-making process. While the budget reductions were the ultimate responsibility of the governing board in consultation with the district administration, a carefully crafted process that included multiple employees at various levels was carried out. Governing Board Member Pat Reed described the process in this exchange:

Researcher: So what I'm hearing is that the community was involved, that it just wasn't made at [the administrative] level. You got feedback and input.

Reed: Yes. It was principals, and it was teachers, and the [teachers' association] had a big say as well.

Administrator of Finance Jerry Hinter also discussed employee involvement in the process. Additionally, he noted that there was agreement on the priority order of the eliminations:

We did get input from everybody, and ideas. It was interesting, when you go around and talk to that many people, how similar a lot of the items lined up. There really weren't huge differences ... generally everybody was of the same sense in terms of protecting classrooms and the integrity of the [learning] system.

Furthermore, Superintendent Jones described the employee involvement process as unusual for a school district:

There are other superintendents who would tell you that I was crazy to go out and ask every employee for their input. ... It's not standard ... I didn't hear any other superintendent talk about going out for that level of input. ... But the fact that the custodian had the chance to weigh in on the school budget—and that we would be that transparent with what things cost—is pretty unusual.

All participants agreed that the process for gathering input for making decisions about budget reductions involved employees at multiple levels. However, no participants reported that parents or students were involved in the process. An examination of governing board meeting minutes, where community members would normally give input, revealed little to no parent or student participation in the process. However, the district informed parents and students about the process through website announcements, newsletters, and e-mail communication.

An absence of parent and student involvement in budget decisions is not out of the ordinary. Cotton and Wikelund (1989) found that school administrators were reluctant to involve parents in matters of governance and budget. Fielding (2001) described student involvement as a phenomenon where educators and parents speak too readily on behalf of students without their consultation. Although parent and student involvement was not reported by the participants, the decision-making process in Brookdale can still be characterized with a high degree of employee involvement.

Transparency in Communication

Interviewees consistently characterized the budget reduction process as transparent. Lauren Doss, librarian, and Sandi Andrews, assistant principal, both felt that the process was transparent:

Lauren: Yes. I think communication was very important and involvement, just in that buy-in of “we’re not sending this down to you. And we want you to be a part of this process . . .”

Sandi: Well, everybody’s opinion counts. “We want to hear what you have to say, we might not be able to use it all, but we’re going to listen.” I think everybody was allowed an opportunity to speak if chosen to do so.

Administrator of Finance Hiner also characterized the process as transparent:

It was very transparent. I don’t know how it could be more transparent than the people being able to see what was going on, because it was their time, their investment that was leading to the results . . . my opinion is that everybody felt they had opportunity to be heard, and were heard.

However, Superintendent Jones noted that while the transparent process was not without risks, it also has the potential to create an environment where stakeholders discuss value and priorities:

The risk is that it begins in a sort of fearful environment. It potentially pits employees against each other. “Let’s see. I think my job is really important, but I don’t think *that* job’s important, and, oh my God, we pay *that* much for *that*?” So it really begins to provoke some conversations about value.

Transparency is an important value in that organizations talk increasingly about the necessity of communicating with stakeholders and the community (van Riel 2000). A trend in organizational

outreach to constituents is to “make important information about their practices available to external audiences” (Christensen 2002, 166). One can argue that during internal shared decision-making processes the same principle applies.

Trust between District Leadership and the Governing Board

Another theme was the level of trust between the governing board and the district’s leadership. The interviews revealed a significant level of trust between the superintendent, district staff, and the governing board. Governing Board Member Reed described a high level of trust with district leadership:

The fortunate thing about our school board is we’re not trying to say, “Oh, we’re school board, so we say—and we’re [going to] do this.” . . . We want recommendations from the expert. So if you ask all these experts, “What’s your advice? Give us your expert advice.” Then we listen, and we weigh what we think and what we know with what they’re telling us, and that’s how decisions really get made. . . . I’m just really impressed with the staff at this district, as far as the cabinet. They’re very, very intelligent and knowledgeable. . . . Thank God, because that’s what you want.

Superintendent Jones also noted the high level of trust in district leadership, particularly in the administrator of finance, Jerry Hinter. She stated, “You will find, if you talk to governing board members, they will also compliment Jerry’s [ability]—just the idea that we had somebody competent in that area, that we knew we could trust his advice and his analysis.”

The relationship between the school board and school district personnel can affect decision-making. There is a significant body of literature that indicates that the relationship between the district superintendent and the school board significantly affects the quality of education and student academic success (Peterson and Williams 2005). In terms of superintendent-recommended action items, favorable board voting is related to the level of trust between the superintendent and the board president (Petersen and Short 2001). The interviews of Superintendent Jones, Administrator of Finance Hinter, and Governing Board Member Reed indicated a significant level of trust between the district leadership and the governing board.

Commitment to District’s Core Values

In each interview, participants noted that the district’s core values, especially its Learning System (see [figure 1](#)), were integral to the process of prioritizing reductions. Superintendent Jones noted:

The district’s Learning System is who we are. The quickest way for me to lose my job would be to lose my focus on the Learning System, as the superintendent. If the governing board ever lost faith that I understood the importance of that Learning System, they’d be looking for a new superintendent.

Mr. Hinter, administrator of finance, also noted the central focus on the Learning System:

I always go back to the Learning System; okay, what's the impact on the Learning System if we don't have that position versus the other position. And that becomes an important ... variable in trying to decide what [we are] going to cut.

Governing Board Member Reed saw the importance of the Learning System in determining priorities and reductions. She also explained the relationship between the Learning System and the decision to retain school librarians when she stated, "I think because we have our Learning System [and] our core values running across the curriculum, [libraries are] a priority in our district."

Assistant Principal Sandi Andrews also commented on the Learning System as integral to the budget process. She stated, "I think that there's no doubt that [the Learning System] influences budget ... our district for lack of a better word, lives and dies by that and how they all effect each other." Finally, librarian Lauren Doss noted how the Learning System provides a framework in which to focus on students. She explained, "I would say [the Learning System] has to [be a priority] because that is what we hear, what we live. I just always think that students are the priority. That is what I think and what I hear so frequently, 'What's going to be the best for the kids?'"

The district's Learning System is an indication of the development of shared values over a period of time. Each participant indicated the central place that the Learning System has in driving the mission and vision of the district. The development of the Learning System as a set of core values is an example of purposing, defined as "that continuous stream of actions by an organization's formal leadership which has the effect of inducing clarity, consensus and commitment regarding the organization's basic purposes" (Vaill 1984, 91). The district leadership, over time, successfully purposed the Learning System as a focal set of core values for district stakeholders.

Value of the School Library Program

Each participant noted the value of the school library program as it relates to the core mission of the school district as a reason for retaining certified school librarians during the time of determining budget reductions. Administrator of Finance Hinter acknowledged the role of the librarian as an expert guide in using technology for research and promoting critical thinking. He stated, "When students do research, there is so much information out there for them to access. They're into a lot more critical thinking than they used to have to do to try to arrive at a conclusion or to draw up their paper. [Librarians are] a big contributor to the schools."

Superintendent Jane Jones noted the librarian's role in schoolwide curriculum integration and literacy promotion. She also commented on the librarian as teacher:

They bring a unique expertise to providing services to students ... if we want to make sure that literacy is seen as everyone's responsibility, then the media center's director plays a unique role in doing that because ... they work with teachers from across the curriculum. They have a unique perspective on what people are doing. ... They deliver instruction in unique ways. ... The decision

was focused on doing everything we could to make sure that we held onto those positions. ... That's just a priority that we had.

Speaking for the governing board's perspective, Governing Board Member Reed noted:

We see that ... the library is integral to just about every single area on campus, every concept, every core subject, including electives. ... The [library] is integral to every area, and that's that. So how can you cut the librarians?

The participants indicated an understanding of the multiple roles of the school librarian in the school. As described in *Information Power: Building Partnerships for Learning* (ALA and AECT 1998), and reaffirmed in the *Standards for the 21st Century Learner* (ALA 2007) and *Empowering Learners: Guidelines for School Library Programs* (ALA 2009), the four roles of the school librarian (teacher, instructional partner, information specialist, and program manager) appear to be understood by stakeholders at all levels of the school district.

This understanding is uncommon. Levitov (2010) states most administrators have little understanding about the roles the school librarian can play in the school academic program. Attempts at educating school administrators and decision-makers about the role of the school librarian are abundant in the literature (Brisco 2003; Hartzell 2007; Howard 2009; McGhee and Jansen 2006; Nutt 2003), which underscores the importance of Brookdale district stakeholders' understanding of the school librarians' role. While this study does not attempt to demonstrate causation between understanding of school librarians' role and the retention of school librarians during an economic crisis, this theme is especially important to note.

Conclusion

This case study was an attempt to uncover the decision-making and rationale behind one school district's decision to retain school librarians during a time of fiscal crisis. Themes based on the values and priorities of the school district were constructed through interviews and examination of documents. Additional investigation should focus on whether the values and priorities found in this case study are evident in other school districts that have chosen to retain school librarians. Additionally, future research should focus on employee and stakeholder understanding of the role of the school librarian and its impact on retention of school librarian positions. Through active participation in the culture of the school district in which they work, librarians can help build a culture that ultimately supports their retention.

While school librarian positions in the district observed for this study were not eliminated in the latest round of cuts, it is clear that, given the state's economic problems, these positions might not be salvaged in the future. Brookdale Union High School District has always staffed its library media centers with certified, full-time school librarians, but administrators and the governing board know of the bleak economic picture in their state. The district anticipates even deeper cuts in upcoming years. When asked about the possibility of eliminating school librarians in the future, Superintendent Jones stated,

It wouldn't be honest of me to say [school librarian positions] would never be on the table. We still think [school librarians] provide unique, valuable services that, in their absence [pauses]. ... I don't know what staffing at a high school looks like without a librarian in the building.

The Brookdale Union High School District's clear strategic focus and commitment to its core values are an encouraging signal for the school library program. Only time will tell whether librarians in Brookdale will become a beacon of the future or a relic of the past.

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