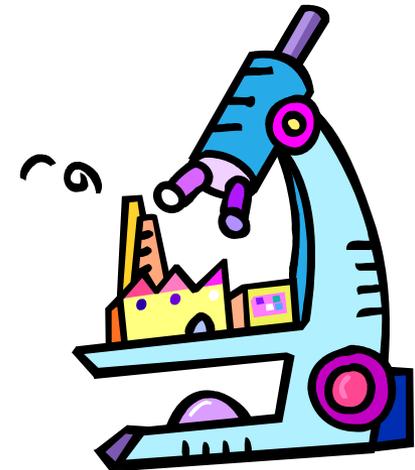


# Reporting Library Materials Aid

John Brock, New York State Education Department  
Peg Mauer, St. Lawrence–Lewis School Library System

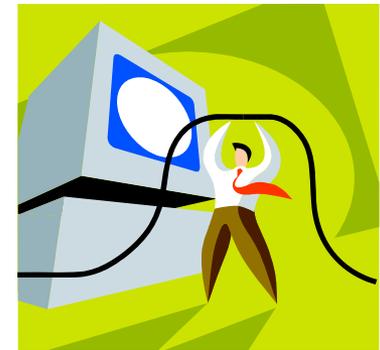
# Background

- ▶ How do we audit what school districts purchase with Section 711 Library Materials Aid (LMA) funds?
- ▶ Better stated – How do we move to more rigorous claims examination?



# What the school librarian can do

1. Find out how the LMA accounting responsibility is vested in the school district office.



# What the school librarian can do



2. Obtain copies of your district's system of classification of library accounts and compare it with the guidance on Library Materials Aid offered at

<http://www.p12.nysed.gov/technology/library/libmataid.html>.

If there are variations between the two, try to account for them with business officials and administrators in the district.

# What the school librarian can do

3. Obtain a copy of a financial report of the board of education. From it, develop an interpretation of expenditure, reporting, and use of Library Materials Aid within the school district.



# What the school librarian can do

4. With the cooperation the school System office, select a given Library Materials transaction and trace and trace it from its initial to its final disposition.



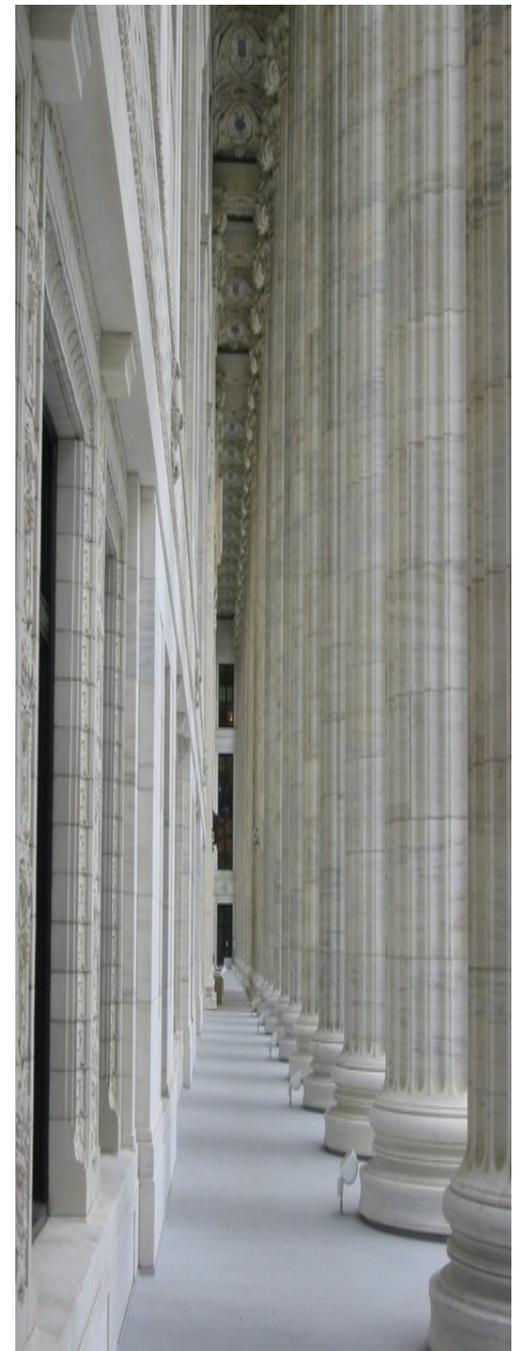
# What State Ed can do

- ▶ 1. Collaborate within State Aid or other SED agencies to include a brief notification on Library Materials Aid in the Form A – State Aid Certification Bulletin, addressing the compliance components out of Ed. Law 711



# What State Ed can do

- ▶ 2. Provide enhanced instructions in SAMS around entries at key 220, based upon the criterion in Education Law 711, so that school administrators using SAMS have more detailed guidance on library materials claims compliance with education Law



# What State Ed can do...

- ▶ 3. Put a "Library Expenses CV Project" on the *2012* SED planning agenda

[https://stateaid.nysed.gov/cv/cv\\_doc\\_for\\_web.pdf](https://stateaid.nysed.gov/cv/cv_doc_for_web.pdf)



# Intensified Claims Verification

- ▶ Develop a basic criterion spreadsheet/table around ST-3 account code A2610.46, Library Materials Aid, to include in the claims verification (CV) process – what should claims for LMA include?
  - ▶ Compile a list of districts from which to request this substantiating documentation around ST-3 account code A2610.46
- 

# How can we track purchases?

If we record LMA purchases in field 852#x of our MARC records, we can produce a report that summarizes titles purchased with these funds.

1. Enter LMA data in field 852#x using the format: LMA + year (all four characters) + month (first three letters) + vendor/publisher (e.g. LMA 2010 Apr Follett). “LMA 2010 Apr Follett”.

2. Add the price to 852#9 in the format: “p99.99usd”.

852 LOCATION (R)	1		a Location (NR)
			<u>SLL</u> <u>YOA</u>
			k Call number prefix (R)
			PRO
			h Classification part (Classification number) (NR)
			027.8
			i Item part (Author cutter) (R)
			<u>BUZ</u>
			p Piece designation (Barcode) (NR)
			YOA10111
			9 Price (NR)
			p42.95usd
			b Sublocation or collection (R)
			<u>YOA</u>
			3 Materials specified (Item type - Loan category) (NR)
			PRO
			x Nonpublic note (R)
			<u>LMA</u> 2010 Apr <u>Follett</u>

# How can we track purchases? *(Cont.)*

3. Create a report for those items (in OPALS):
  - Go to Administration → Reports/Tools → 852-Subfield Search
  - Search subfield x for the data for that year. For example: “LMA 2010”

## Search Holding (852) Subfields ?

Subfield Code:  Subfield Data:

1-12 of 12

First « Previous **1** 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 Next » Last

ID	Title	Author	Call Number	Barcode	Price	Subfield x Data
<a href="#">259</a>	<a href="#">Beyond picture books: subject access to best books for beginning readers</a>	Barstow, Barbara.	PRO 011.62 BAR	YOA10110	p80.96usd	<a href="#">LMA 2010 Apr Follett</a>
<a href="#">260</a>	<a href="#">The collaboration handbook</a>	Buzzeo, Toni.	PRO 027.8 BUZ	YOA10111	p42.95usd	<a href="#">LMA 2010 Apr Follett</a>
<a href="#">261</a>	<a href="#">Guided inquiry: learning in the 21st century</a>	Kuhlthau, Carol Collier	PRO 371.39 KUH	YOA10112	p43.20usd	<a href="#">LMA 2010 Apr Follett</a>
<a href="#">262</a>	<a href="#">Improving student achievement: 50 research-based strategies</a>	Nichols, Beverly	PRO 373.12 NIC	YOA10113	p44.95usd	<a href="#">LMA 2010 Apr Follett</a>
<a href="#">263</a>	<a href="#">Information literacy: search strategies, tools &amp; resources for high school students and college freshmen</a>	Ercegovac, Zorana	PRO 025.5 ERC	YOA10114	p44.95usd	<a href="#">LMA 2010 Apr Follett</a>

## 4. Print the report.

# Instructional Materials Aid (IMA)

▶ Textbook Aid (701)	\$58.25
▶ Software Aid (751)	\$14.98
▶ Hardware Aid (753)	\$24.20
▶ Library Aid (711)	\$6.25
	<hr/>
▶ Total	\$103.68

# Duty to Lend

- ▶ 711 + 712
  - ▶ 751 + 752
  - ▶ 753 + 754
  - ▶ 701 + BOR Rules 21.2, Lending Procedures
  
  - ▶ With each Instructional Materials aid comes the duty to lend materials (up to the apportionment) to Non-public NY school students
- 