

THE BALTIMORE LIBRARY PROJECT TOOLKIT

A GUIDE TO USING
PUBLIC-PHILANTHROPIC
PARTNERSHIP TO IMPACT
STUDENT ACHIEVEMENT



The Harry and Jeanette
Weinberg Foundation

BALTIMORE CITY
PUBLIC SCHOOLS

SharpInsight

The Baltimore Library Project is a multi-year collaborative effort of the Harry and Jeanette Weinberg Foundation, Baltimore City Public Schools, and more than 30 partners to build or transform Baltimore City Public School libraries. The Toolkit was developed by Sharp Insight, LLC as one component of an evaluation of the Baltimore Library Project.

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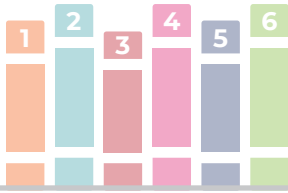
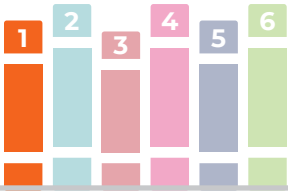


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INTRODUCTION



The Baltimore Library Project is a successful, long-term public-philanthropic partnership between the Harry and Jeanette Weinberg Foundation (“Weinberg Foundation”), Baltimore City Public Schools (“City Schools”), and more than 30 nonprofit and corporate partners. Since 2011, the Baltimore Library Project has worked together to transform school libraries into inspirational spaces to impact educational achievement. At the time of this publication, the Baltimore Library Project has fully renovated seventeen libraries with two libraries slated for renovation.

“Every aspect of the [Baltimore Library Project] could be used as a model program for other districts, if another district could get a funder like the Weinberg Foundation. We have the blueprint in Baltimore City with the Baltimore City [schools] and Weinberg Foundation partnership to show how to create strong library programs.”

– City Schools Principal

While many factors contribute to student achievement, the Baltimore Library Project chose to focus on school libraries because research indicates that well-staffed, well-designed, and well-resourced libraries can help students make academic gains.^{1,2,3} However, many school libraries lack these fundamental components. Specifically, schools in areas with higher levels of poverty, more students from minoritized racial/ethnic backgrounds, and more English learners are less likely to have librarians⁴ and often have the greatest need for building repairs and modernization.^{5,6}

The libraries that have been built through the Baltimore Library Project have been described as “extraordinary,” “vibrant,” “unique,” “exciting,” and “inviting,” but they are more than a pretty space. These libraries are staffed with full-time certified librarians, filled with books and technology, and serve as a community space for providing additional resources, including enrichment programming, food, coats, and shoes. In external evaluations, the Baltimore Library Project sites have been positively associated with student literacy, student engagement in reading, and school climate.

This Toolkit is designed to inspire and guide funders, collaboratives, school districts, and other entities considering a library project within their own communities. The Toolkit is organized into three core phases of library project work: (1) Establishing your partnership, (2) Building your library, and (3) Implementing your vision. Within each phase are various steps, each including an overview, shared experiences from the Baltimore Library Project, and questions for consideration when planning future library projects.

¹ T Dow, M. J., & Lakin, J. M. (2012). School Librarian Staffing Levels and Student Achievement as Represented in 2006–2009 Kansas Annual Yearly Progress Data. *School Library Research*, 15. <https://files.eric.ed.gov/fulltext/EJ994364.pdf>

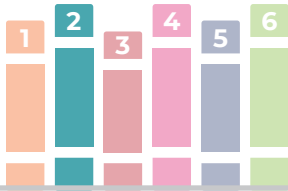
² Lance, K. C., & Hofshire, L. (2011). Something to Shout About: New Research Shows that more Librarians Means Higher Reading Scores. *School Library Journal*, 28–33.

³ Maxwell, L. E., & French, R. (2016). Elementary School Library Design: Student Perceptions of a Learning Commons. *Children, Youth and Environments*, 26(2), 61–82. <https://doi.org/10.7721/chilyoutenvi.26.2.0061>

⁴ Kachel, D. E., & Lance, K. C. (2017). Changing Times: School Librarian Staffing Status. *Teacher Librarian*, 45(4), 14–19.

⁵ Filardo, M., & Vincent, J. M. (2017). Adequate & Equitable U.S. PK-12 Infrastructure Priority Actions for Systemic Reform: A report from the Planning for PK-12 School Infrastructure National Initiative.

⁶ Jackson, V., & Johnson, N. (2021). America’s School Infrastructure Needs a Major Investment of Federal Funds to Advance an Equitable Recovery. <https://www.cbpp.org/research/state-budget-and-tax/americas-school-infrastructure-needs-a-major-investment-of-federal>



I. ESTABLISHING THE PARTNERSHIP



The early planning phases of your Library Project are essential. This phase includes broadly thinking about project vision and identifying potential partners. During this planning phase, key project details need to be established, including defining success, financing the project, selecting schools, and thinking about sustainability.

“The concept [is] simple – transform elementary and middle school libraries in some of Baltimore’s most challenged communities into inspirational spaces, with the goal of improving overall academic achievement.” – The Baltimore Library Project

STARTING WITH A VISION

A clear vision for a library project is essential for long-term success. This vision will foster productive and focused communication, help attract potential partners to the work, and serve as a guidepost throughout many years of implementation and sustainability.

There are many key questions to consider when crafting a vision, which ultimately provides rationale and motivation for ongoing efforts. Most essential are: Why are school libraries the focus? Why is a specific district, community, school type and school level the intended beneficiary of a library project? And how can a public-philanthropic partnership support this work?

It takes time, and likely several iterations, to develop a clear vision. Seeking input and feedback from many individuals, both familiar and unfamiliar with this work, can help refine early ideas. To inspire a vision, it may be helpful to schedule visits or informational interviews with people who have been involved with library projects as well as with people at the district and school level who are involved with the school libraries in the community.



THE BALTIMORE LIBRARY PROJECT STORY

From the start of the initiative, the Library Project set out “to transform inner-city school libraries into inspirational spaces in order to impact educational achievement.” The vision for the Baltimore Library Project was informed by:

- ▶ **Conversations** with City Schools staff and educational professionals; library experts; students; and civic, corporate, and foundation leaders. These conversations provided insights into the importance of libraries, recommendations for the project, and areas of concern. A key insight was the suggestion to keep a limited focus and scale to the project, in other words, “to pick one thing and do it well.”⁷
- ▶ **Successful initiatives that focused on libraries.** These initiatives showed that the vision could become a reality. These included:
 - *The Library Initiative, a partnership of the Robin Hood Foundation and the New York City Department of Education, which funded many library renovations.*
 - *The Capital Hill Community Foundation, which led a public-philanthropic partnership with DC Public Schools to complete eight library renovations on time and under budget.*
 - *The Baltimore Community Foundation’s Library Funds, which renovated three libraries in Baltimore City.*
- ▶ **Research** showing that well-equipped, well-resourced libraries staffed by a full-time certified librarian and support staff contribute to gains in students learning.
- ▶ A **fundamental belief** that all children deserve well-equipped, well-resourced, and well-staffed libraries.

“The Weinberg Foundation has been very committed to this. They have had a really clear vision... They believe strongly in it and have not wavered on that. They have remained committed to [the Library Project] as something that all schools should have... I think that that has been what has made the program last so long and been so effective.” – City Schools Central Office Employee

⁷Falkenberg, N., Gould, D., David, M., Sheldon, S. (2017). Report on the Baltimore Library Project. <https://baltimorelibraryproject.org/epilogue/>



STARTING WITH A VISION

- *What is the vision for the library project in the local community?*
- *What research supports this vision?*
- *What philosophy or core belief grounds this vision?*

IDENTIFYING POTENTIAL PARTNERS

A public-philanthropic partnership is at the heart of the Library Project model. Cross-sector partnerships can provide opportunities to creatively solve problems by capitalizing on the strengths that each partner brings. Partnerships take effort but can bring great benefits to the community as well as to the individual partners.

Some early partnership considerations⁸ might include:

- ▶ **Discussing what each individual and/or entity brings to the partnership.** Although funding is obviously important, partners can think through all the ways they can contribute to the project. These contributions might include providing accommodations for partnership meetings and events, contributing staffing and expertise, managing aspects of the partnership, sharing background information and data, disseminating information and data, and creating networking or relationship-building opportunities with other organizations and sectors.
- ▶ **Considering the benefits and risks to each entity entering the partnership.** Potential benefits might include accomplishing something bigger than any individual entity could do on their own, receiving professional development for key personnel, gaining access to information and networks, expanding reach, improving operational efficiency, increasing opportunities for innovation, enhancing credibility, and increasing access to resources. Risks could include a reputational risk if the project is not successful, loss of autonomy when working collaboratively, conflicts of interest, increases in resource expenditures, and implementation challenges. By thinking through the risks and benefits, partners will have a clear idea of what the partnership can offer.

⁸Tennyson, R. (2011). *The Partnering Toolbook*. London, UK: International Business Leaders Forum.

I. ESTABLISHING THE PARTNERSHIP



In early meetings with potential partners, Library Project leaders can share the project vision and how working in partnership could achieve that vision. Partners should think about what could realistically be achieved and consider what challenges might be faced. By discussing roles and sharing concerns in the early stages of partnership development, partners can work together to address issues, which, in turn, can help build an open and collaborative atmosphere.

Partnerships can happen at the district level or at the individual school level. The Baltimore Library Project recommends partnering at the district level because this allows prioritization of school needs across a district and the consideration of equity in making decisions about which schools could most benefit. The district perspective can also provide information about available district-wide resources as well as any planned construction and renovation projects. Imagine that a new library was constructed, only to later find out that the school had been slated for a full-scale renovation. Without district involvement, navigating responses to such scenarios can be substantially more complicated.

When considering partners, funders, schools, and districts are just the start of the list. Other key partners will potentially include architectural firms, design firms, evaluators, a full range of community-based organizations, and beyond. Having these partners around the table from the start supports alignment and communication.



THE BALTIMORE LIBRARY PROJECT STORY

The Baltimore Library Project started with two key partners: the Harry and Jeannette Weinberg Foundation and Baltimore City Public Schools. A formal partnership agreement was signed between the Weinberg Foundation and City Schools in September 2011. However, two partners can't do it alone! Over the years, the Baltimore Library Project has engaged more than 30 community and government partners in support of the work.

THE HARRY AND JEANNETTE WEINBERG FOUNDATION

The mission of the Harry and Jeannette Weinberg Foundation is to meet the basic needs of people experiencing poverty. Recognizing that education can help break the poverty cycle, the Weinberg Foundation's work includes a focus on supporting initiatives that provide at-risk children and youth with academic opportunities. Inspired by previous library-focused initiatives in other geographic locations, the Weinberg Foundation brought this idea to Baltimore City in 2011. The Foundation has committed \$15 million to this project.



BALTIMORE CITY PUBLIC SCHOOLS

The Baltimore City Public School District includes 155 schools with a collective enrollment of over 77,000 students. The majority of students are African American (74%), followed by Hispanic/Latino (16%), and White (7%). American Indian, Asian, and Pacific Islander students each represent less than five percent of the student body. Many students are low income (61%).⁹ Overall, fewer than 20% of third to fifth graders were proficient in math and English language arts in the 2018-19 school year.⁹ A review in 2011 reported that 97% of Baltimore City Schools buildings were built before 1985.

ADDITIONAL PARTNERS

A variety of other partners have participated in the project. Some are business partners, including the architecture firm and the design firm that contribute to the overall look and feel of the library spaces. The project's nonprofit partners provide a wide array of services in Baltimore Library Project libraries, including literacy programs, food banks, and arts programs.



IDENTIFYING POTENTIAL PARTNERS

- *Who are the key players who have already expressed interest in the project?*
- *What additional areas of expertise would be helpful to bring to the partnership team (e.g., funding, leadership, operations, community engagement)?*
- *Where are there gaps in terms of sector representation? Whose voices are missing?*

⁹ Baltimore City Public Schools (2022). City Schools at a Glance. <https://www.baltimorecityschools.org/district-overview>

¹⁰ Baltimore City Public Schools (2022). School Buildings, Facility Condition Index (Chapter 5). <https://www.baltimorecityschools.org/buildings>

¹¹ Weinberg Foundation (2022). Characters: Partners and Sponsors. <https://baltimorelibraryproject.org/characters/>

DEFINING LIBRARY PROJECT SUCCESS

Sharing a vision is a great starting point. From there, partners need to work together to ensure a common understanding of the project and how success will be defined. While this work may sound straightforward, it can be challenging to prioritize the establishment of theoretical frameworks and performance measures when more tangible tasks are at hand. And yet, aligning on success from the start of the initiative lays the groundwork for effective monitoring, evaluation, and reporting for years to come.

One way to establish a shared understanding of the work is to develop a Library Project logic model. Such a theoretical framework that can help teams make the connection between the project's resources, activities, outputs, and outcomes. The benefits of creating a logic model as a foundation may include:

- ✓ *Clarifying the purpose of the Library Project (the "why")*
- ✓ *Describing how the Library Project will lead to meaningful change*
- ✓ *Creating a common vocabulary around Library Project success*
- ✓ *Supporting leadership and staff alignment*
- ✓ *Providing the basis for Library Project monitoring and evaluation, and*
- ✓ *Helping to effectively communicate the model so that newcomers to the Library Project can better understand and support the work.*

Discussions around measuring project success often involve careful listening and compromise. Like the crafting of the vision statement, this work will likely take several iterations. Then, with the core content elements in place, project leaders will be able to expand the work by establishing roles and responsibilities around a clear definition of success.



THE BALTIMORE LIBRARY PROJECT STORY

Over the years, the Baltimore Library Project has consistently approached defining success as a collaborative process. In the earliest years of the work, the project focus was “crystallized through an iterative process” using interviews to conceptualize and define the work.⁷ Notably, the Foundation did not begin the work with a rigid plan but turned to local leaders for guidance and recommendations. This open, flexible approach to defining the work has continued over the years. School district employees in the most recent evaluation of the Baltimore Library Project echoed this sentiment by talking about the importance of working with a foundation that is willing to listen to their needs, rather than imposing their agenda.

The iterative, flexible model for defining success has been a factor in building a trusting partnership, though upon reflection, the Foundation and partners indicated there was a gap in an early stage logic model. While the initiation of the Baltimore Library Project was grounded in literature on libraries and their staffing that support student academic gains, an early logic model could have further supported the library project evaluation design from the start of the initiative.



DEFINING LIBRARY PROJECT SUCCESS

- *What is the purpose of the Library Project? How aligned is this description with colleagues' descriptions?*
- *What will success look like for the Library Project, from construction to an impact on literacy? How might these elements of success change in the short-, mid-, and long-term?*
- *Who are the key players from each organization whose work will ensure the success of the project?*



SOLIDIFYING FUNDING AND FISCAL MANAGEMENT

Financing of public education in the United States has traditionally been a governmental responsibility.¹² However, the specific funding mechanisms for school construction and renovation projects, such as those for school libraries, varies across the U.S. and within states. This is due to the U.S.'s largely decentralized education system, in which the states have final constitutional authority.^{12,13} States have typically allowed local districts to play a dominant role in governance and finance of primary and secondary education.^{12,13} It is believed that local control allows school systems to design instructional approaches and facilities that best fit their needs.¹⁴ While schools represent the second largest sector of public infrastructure spending, surpassed only by highways, the American Society of Civil Engineers recently gave the U.S. education infrastructure a grade of "D+" based on the current physical condition of schools and their needed improvements.¹⁵

Given this context, funding is a key ingredient to a successful public-philanthropic partnership for a library project. From the start of a library project, it is essential to have an in-depth understanding of the partnership's financial landscape. Broadly, this includes available state funding opportunities, the local or district approach to funding capital improvements, and commitments of philanthropic partners. The circumstances of each of these three components are unique from one jurisdiction to another, and from one year to the next. As such, this Toolkit does not provide detailed guidance around funding pathways; rather, the guidance provided is designed to support clarity, transparency, and ultimately, decisions around library project feasibility.

- ▶ **At the state level**, while many states provide some funding for school infrastructure, some states provide little to no financial support.^{5,16} Therefore, library project partners will need to explore the extent to which infrastructure funding is available, if infrastructure funding is connected to state funding for school operations, and the mechanisms for distribution of funding (e.g., project grants, debt service grants, state loans and bond guarantees, or lottery proceedings).

¹² Gordon, N. E. (2012). *The Changing Federal Role in Education Finance and Governance* (H. F. Ladd, E. B. Fiske, & A. Reschovsky, Eds.; pp. 2021–2028). Taylor & Francis Group.

¹³ Frisch, A. M. (2017). *The Class is Greener on the Other Side: How Private Donations to Public Schools Play into Fair Funding*. *Duke Law Journal*, 67, 427–479.

¹⁴ 21st Century School Facilities Commission. (2018). *21st Century School Facilities Commission Final Report*. <http://dls.maryland.gov/home/>

¹⁵ American Society of Civil Engineers. (2021). *Schools - 2021 Report Card for America's Infrastructure*. <https://infrastructurereportcard.org/cat-item/schools/>

¹⁶ Verstegen, D. A. (2016). *Policy Perspectives on State Elementary and Secondary Public Education Finance Systems in the United States*. *Educational Considerations*, 43(2), 25–32.

I. ESTABLISHING THE PARTNERSHIP



- ▶ **At the local or district level**, several different funding mechanisms have been identified for capital expenses, but property taxes are usually the main source of local funds.^{17,18} Because most capital funding for schools relies on local property taxes, the ability to pay for school construction and renovation is tied to community wealth, which leads to systemic inequities in facilities and perpetuates existing privilege.^{19,20} As such, library project partners will need a solid understanding of how to navigate your district’s unique processes for infrastructure spending.
- ▶ **From the philanthropic angle**, guidance questions will center around the entity’s commitment to the Library Project and the detailed terms of funding. This includes, but is not limited to, a clear understanding of the philanthropic organization’s financial commitment, requirements for matched or leveraged funding, and parameters around use and limitations of expenditures.

Having a strong understanding of library project funding opportunities is an essential step toward project feasibility. Next, partners will need to prepare for sound fiscal management of the initiative. Fiscal management can include, but is not limited to, the oversight of the library project’s revenues and expenditures, including accounting operations, payment to contractors and vendors, financial planning, financial reporting, and financial compliance. An additional element of fiscal management that is often difficult to address is how the project will be able to sustain itself should any of the existing funding opportunities cease to exist. Specifying the processes through which funds are managed and disbursed is an indispensable consideration for a library project, not only at start-up but throughout the duration of the project.

¹⁷ McGuire, T. J., & Papke, L. E. (2012). Local Funding of Schools: The Property Tax and its Alternatives. In H. F. Ladd, E. B. Fiske, & A. Reschovsky (Eds.), *Handbook of Research in Education Finance and Policy*. Taylor & Francis Group.

¹⁸ U.S. Government Accountability Office. (2020). K-12 EDUCATION School Districts Frequently Identified Multiple Building Systems Needing Updates or Replacement Report to Congressional Addressees United States Government Accountability Office. <https://www.gao.gov/products/gao-20-494>

¹⁹ Filardo, M., Vincent, J. M., & Sullivan, K. (2018). Education Equity Requires Modern School Facilities The case for federal funding for school infrastructure. http://www.21csf.org/best-home/docuploads/pub/340_EducationEquityRequiresModernSchoolFacilities.pdf

²⁰ Levine, M. (2019). Philanthropy and Public Education: A Good Partnership? *Nonprofit Quarterly*. <https://nonprofitquarterly.org/philanthropy-and-public-education-a-good-partnership/>



THE BALTIMORE LIBRARY PROJECT STORY

According to the by-laws of the Weinberg Foundation, the Foundation can contribute up to 30% of the total costs of a capital project, which was shared with partners candidly at the start. City Schools agreed to provide the remaining 70% of capital costs. In the early years of the project, City Schools was able to leverage federal funding through the Qualified Zone Academy Bonds (QZAB) funding to cover their contribution; however, QZAB funding was eliminated in 2018.

Currently, the Capital Improvement Program (CIP), a state allocation system, is the main source of funding used by City Schools for the Baltimore Library Project. CIP funds are typically used for systems, like HVAC, windows, and roofs. Although many factors are involved in the actual selection of schools that receive a Baltimore Library Project renovation, a major factor has become whether the school is already receiving CIP funding for multi-systems projects. For the school system's match, City Schools calculates the percentage of CIP funds that go specifically into the library, for example, the square footage of the roof that is over the library.

Any number of factors may impact the total costs of construction, maintenance, and operations, including, but not limited to, municipal borrowing rates and regional variations in costs for materials and labor. At the time of this publication, we are experiencing post-pandemic increases in construction costs. Pre-pandemic, the construction costs for the library renovations were about \$600,000. Additional costs were for books (\$50,000), technology (\$33,500), design and furnishings (\$72,000), and miscellaneous costs including architect fees, project management fees, and additional construction costs (~\$140,000) for a total of just over \$900,000.

The Weinberg Foundation engaged the Fund for Educational Excellence as an independent, intermediary organization to provide fiscal management. The Fund for Educational Excellence disperses grant funds and provides project-specific financial oversight. The Fund also manages project components related to ordering technology, building, and staffing expenses.



SOLIDIFYING FUNDING AND FISCAL MANAGEMENT

- *To what extent have partners openly engaged in discussions about project funding and/or fiscal management?*
- *What sources of federal, state, or county funds are available for library construction?*
- *What is the financial commitment by the philanthropic organization to the Library Project? What parameters will guide how this financial commitment may be expended over time?*
- *How can existing state, district, and philanthropic commitments leverage additional funding opportunities across sectors to further support investment in the library project?*
- *What plans are in place should any of the current funding sources no longer be available?*

DETERMINING EQUITABLE CRITERIA FOR SCHOOL SELECTION

It is an incredibly challenging task for any library project partnership to determine which school(s) will receive such an incredible investment. This determination can be further challenged by the deep inequities in school infrastructure funding throughout the United States. Schools in areas with high concentrations of poverty disproportionately serve children of color and often have the greatest need for building repairs and modernization to meet current educational needs.^{5,6} Because most capital funding for schools relies on local property taxes, as described above, the ability to pay for school construction and renovation is tied to community wealth, which leads to systemic inequities in facilities and perpetuates existing privilege.^{19,20} Philanthropic support in education could be a strategy to provide needed funds to schools; however, given that most philanthropic funding remains local, many wealthier school districts continue to receive philanthropic support, resulting in even greater advantages.²¹

While a library project cannot address all the deep, systemic inequities facing educational systems, it can serve as a model for equitable investment in schools within an individual community. One way this can be approached is through the development of clear and transparent criteria for school selection. These criteria may be based on factors such as: infrastructure indicators (e.g., age and state of current facilities), economic indicators (e.g., percent of students eligible for free and reduced meals), future enrollment projections, and school leadership support.

In addition to developing and sharing criteria for school selection, the library project partnership will also need to establish a process for using those criteria. This will include determining who will be involved in the decision-making process, how the initial pool of schools will be developed, what will be documented internally, and what will be publicly shared with respect to the selection process.

While this upfront work takes time, intentional processes will set the stage for clear, transparent, and equity-centered decision-making processes throughout a library project initiative.

²¹ Gazley, B. (2015, March 27). How Philanthropy Props Up Public Services and Why We Should Care. *Nonprofit Quarterly*. <https://nonprofitquarterly.org/how-philanthropy-props-up-public-services-and-why-we-should-care/>



THE BALTIMORE LIBRARY PROJECT STORY

In the Baltimore Library Project, City Schools has the responsibility of identifying which schools could potentially become Baltimore Library Project schools. Neighborhood needs as well as funding streams have had a big influence on school selection. Initially, receiving QZAB funding was an important consideration. Schools that received QZAB funds had to meet specific requirements, including being located in an empowerment zone or enterprise community²² and having at least 35% of students qualify for free and reduced meals (FARMS). In addition, the Weinberg Foundation's operating rules limited consideration of schools to those with a FARMS rate of at least 50%. As mentioned above, due to the loss of QZAB funding, the school district currently looks at schools with capital improvement project funding that can be counted toward the library renovation.

The Baltimore Library Project team chose to focus on libraries in elementary and middle schools because of the critical role that early literacy plays in educational development. Additionally, the Library Project has remained focused on Baltimore. The Weinberg Foundation funds projects in select priority communities, one of which is Baltimore. One of the interviewees in the 2022 evaluation identified the importance of partners having a shared commitment to a geographic area. The Baltimore Library Project team also looked at geographic diversity within the city. They wanted to ensure that the libraries were spread throughout the district and/or placed in locations that have limited access to public libraries.

Other factors that were important to school selection included whether the school had:

- *A principal who was active, engaged, and supportive of library activities*
- *A librarian on staff or a willingness to hire a librarian*
- *An engaged school community that will use the library*
- *Sufficient enrollment to absorb the added library staffing costs*
- *Any enrollment projections that might indicate that the school might be closed in the near future, and*
- *Any plans for a full-school renovation that could impact a renovated library.*

Initially, the Baltimore Library Project used an application process for school selection; however, this was eliminated as the QZAB funds became unavailable. The reliance on CIP funds has limited which schools could be included, so a formal application process is no longer used.

²² Empowerment zones and enterprise communities are federally designated geographic areas characterized by high levels of poverty that may receive targeted federal funding.



DETERMINING CRITERIA FOR SCHOOL SELECTION

- *What selection criteria are most important to library project partners when considering potential sites?*
- *Which individuals within the partnership will be responsible for library project site selection?*
- *What processes will be in place for internal documentation and external sharing of site selection decisions?*
- *How will library project partners address equity, clarity, and transparency in the site selection processes?*

FORMALIZING THE COMMITMENT BETWEEN PARTNERS

Once the groundwork has been laid for a school library project, it is time to formalize the agreement between partners. The approach can vary, from a Memorandum of Understanding (MOU) to a legally binding contract. An MOU is a formal document between two or more parties that describes the agreement between the parties and the mutually accepted expectations of each party. While MOUs are not necessarily legally binding, they can be made so by the inclusion of a clause specifying that it is binding. Formalizing mutual commitments between partners through written documentation can support continuity when circumstances shift, such as a change in leadership or community economics.

Library project partners will likely include the participating school district(s), philanthropic or funding partner(s), and other community partners who may be supporting the initiative. When working across entities and sectors, there can be differences in partnership agreement familiarity, terminology, templates, and approval processes. This is important to keep in mind, so be sure to include opportunities for discussion, review, and revision, as needed. The time spent upfront to clarify detailed terms of partnerships will support these commitments throughout the implementation of the library project.



THE BALTIMORE LIBRARY PROJECT STORY

The Baltimore Library Project uses MOUs between City Schools and the Weinberg Foundation, with language stating that the document is legally binding (see Appendix A). The MOU provides roles and responsibilities during the construction portion of the project. In addition, annual Operating Agreements with each school specify the roles and responsibilities related to operations of each library (see Appendix B), and an overarching Maintenance Agreement specifies ongoing maintenance roles and responsibilities (see Appendix C). Finally, individual MOUs are signed with additional partners, such as with partnering community-based organizations.

The MOU between the Weinberg Foundation and City Schools specifies the following:

- *Identification of which schools will become part of the Library Project.*
- *Timeline and work schedule for the completion of renovations at each school.*
- *Identification of critical staffing for coordinating project activities and overseeing construction and design, including any contracted partners, such as the interior design firm and the fiscal agent. In the Baltimore Library Project, the MOU states that the Weinberg Foundation will participate with City Schools in the oversight of the design and construction.*
- *Description of funding sources and a breakdown of partner contributions.*
- *Identification of who will develop the detailed budget for each library.*
- *Description of how funds will be managed and disbursed.*
- *Acknowledgement of processes required by each partner's existing organization, for example:*
 - *City Schools-funded elements must be competitively bid.*
 - *City Schools secures any and all permits needed prior to the start of interior work.*
 - *City Schools requires that a list of all contractors and subcontractors who will be working in the schools be provided along with a schedule for work that was not competitively bid. Background checks and fingerprinting are required, with the agreement specifying that the project will pay for these services at the time fingerprinting is performed. Any registered child sex offenders are prohibited from engaging in any work on City Schools property.*
 - *The Weinberg Foundation can only contribute up to 30% of the total costs of a capital project.*

I. ESTABLISHING THE PARTNERSHIP



- *Determination of who is responsible for costs related to hazardous materials abatement in the library spaces, if needed. In the Baltimore Library Project, this responsibility belongs to City Schools.*
- *Determination of who will purchase and install the library furniture, fixtures, and equipment. In the Baltimore Library Project, this was identified as a responsibility of the Weinberg Foundation.*
- *A reporting process so that progress updates are provided regularly. This process should also allow for the opportunity to solicit guidance or assistance as needed to move the project forward.*

In addition to these general considerations, the MOU for the Baltimore Library Project also includes some additional specifications:

- *An advisory board would be convened and chaired by the Weinberg Foundation with City Schools agreeing to participate.*
- *The Weinberg Foundation also requested that the [Food Bank] have a food pantry in each school, as close to the library as practical. City Schools will engage in “reasonable best efforts” to implement this plan.*
- *The Weinberg Foundation will bring other funding partners to the project. The support from these partners included financial support, in-kind donations, and discounts.*

The **Operating Agreements** detail that the schools will maintain a full-time, certified librarian, participate in data collection, and ensure that students have weekly access to the library. The Foundation commits to supporting the part-time library clerk, professional development for the librarians, non-profit and corporate partner relationships, book collections, and technology. This support is initially provided for four years, with an additional two years if the school maintains the full-time, certified librarian.

The **Maintenance Agreement** is an overarching agreement from the Weinberg Foundation that specifies the Weinberg Foundation’s commitments regarding the maintenance and upkeep of the library. This support is initially provided for four years, with an additional two years if the school maintains the full-time, certified librarian.



FORMALIZING THE COMMITMENT BETWEEN PARTNERS

- *What type of documented agreement will be best suited for the library project?*
- *Which individual(s) within each of the partner organizations would be best suited to develop and/or approve this agreement?*
- *What are the requirements or by-laws of library project partners that could affect potential partnership activities?*
- *What unique elements would be most important to partners when developing operating and/or maintenance agreements?*

IMPLEMENTING GOVERNANCE AND ACCOUNTABILITY STRUCTURES

While partnership agreements should spell out the specifics of how decision-making and management processes are intended to occur, processes for implementing governance and accountability structures are necessary to ensure that they happen. Forming decision-making entities can be instrumental, including one at the systems level and one at the school level. (Note: These entities are in addition to the fiscal management entity, which should remain independent.)

- ▶ **The systems-level governance entity**, such as an advisory board or committee, would be responsible for high-level planning and strategy, cultivating project and partner enthusiasm, problem solving, sustainability planning, and in the case of a multi-site project, aligning processes between sites. Members of the systems-level entity may include lead project partners, representatives from the offices of legislators, and/or individuals with outside expertise to provide guidance on future needs of libraries. Including external partners can be helpful in supporting the credibility and increased visibility of the project.
- ▶ **The school-level implementation entity** would be responsible for the oversight of logistics related to the construction of their library. Members of the school-level entity may include some of the same members as the systems-level entity but would primarily focus on those most intimately involved in the construction, such as the school leadership, architect, designer, and construction team leader.

I. ESTABLISHING THE PARTNERSHIP



These accountability processes support the clear delineation of roles, tasks, and timelines throughout the library project. It is important to recognize that circumstances will come up that might make it difficult to meet project requirements. Working closely and ensuring early and ongoing communications within and between the decision-making entities allows partners to understand each other's unique perspectives and provides the opportunity for the partners to address any issues that come up.



THE BALTIMORE LIBRARY PROJECT STORY

The Baltimore Library Project has utilized the two decision-making entities described above (see Figure 1). For the Baltimore Library Project, the MOU specified the creation of an Advisory Committee, which is chaired by the Weinberg Foundation and attended by key representatives from City Schools. Additionally, Implementation Teams provide oversight of construction projects at each school.

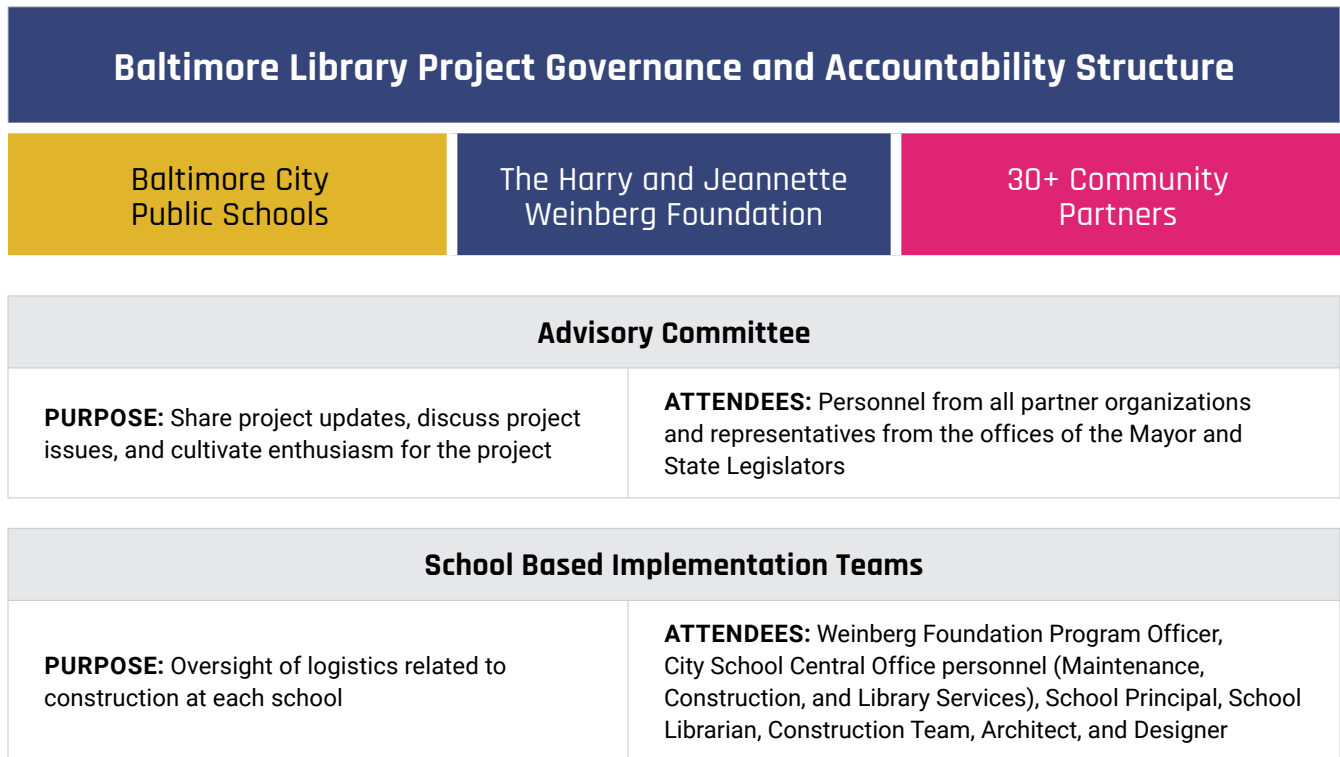


Figure 1. Overview of the Baltimore Library Project Governance and Accountability Structure



The **Baltimore Library Project Advisory Committee** met quarterly in the early years of the project. As mentioned above, the Committee is chaired by the Weinberg Foundation and attended by key representatives from City Schools, as well as community partners and representatives from the offices of City and State legislators. Early Advisory Committee meetings built excitement around a shared vision and focused on sharing construction progress, information about project processes such as school selection, presentations by community partners, and information about upcoming events. Partners identified that the networking opportunities that occurred during these meetings led to new connections and additional partnership opportunities. Later meetings also included a focus on evaluation activities and sharing evaluation findings.

In the Baltimore Library Project, the **School-based Implementation Teams** and processes are customized for each site. For example, the Baltimore Library Project originally aimed to complete all construction work during the summer when students were not in the building; however, it became difficult to find contractors who could meet these stringent project deadlines. The construction schedule has since been modified, with the recognition that some work will need to be completed during the school year. Clear communication between City Schools and the Weinberg Foundation has allowed the parties to work through these challenges. Finally, while some aspects of the implementation teams are unique, all schools are required to complete annual reports about how the library is doing in terms of staffing, partnerships, maintenance, and funding.



IMPLEMENTING GOVERNANCE AND ACCOUNTABILITY STRUCTURES

- *What governance and accountability structures make the most sense for the library project?*
- *From a systems-level perspective, which entities and/or individuals would be most appropriate to support high-level strategy, problem-solving, and visibility?*
- *From a school-level perspective, which entities and/or individuals would be most appropriate to ensure effective implementation of the library construction, staffing, and programming?*



CREATING A SUSTAINABILITY PLAN

It is never too early to engage in long-term planning that will support a project's long-term sustainability. An unresolved issue for public-philanthropic partnerships focusing on educational programming is determining who is responsible for sustaining initiatives funded or started through such partnerships.²³ Traditional funding models do not provide for ongoing maintenance and repair needs, and only seventeen states provide districts with funding support for maintenance and operations.¹⁸ Therefore, elevating the importance of sustainability as early as possible in a library project planning is strongly encouraged.

A comprehensive sustainability plan may include various components, such as financial sustainability, partnership and operational sustainability, and infrastructure sustainability. With respect to financial sustainability, it will be essential to understand when current funding streams in support of a library project will end. This may include, but would not be limited to, the primary philanthropic partner's funding commitment. Having a plan in place to maintain the strength of existing partnerships and operations will also be essential in supporting the successful longevity of a library project's programming. This may include long-term partnership agreements and/or operational management agreements to support consistent programming, staffing, and delivery of library services over time. Finally, infrastructure sustainability could focus on roles and responsibilities with respect to ongoing maintenance of the structure, furniture, technology, and collections.

While a sustainability plan will provide a strong foundation to support the longevity of a library project, it should be considered a living document. Funding, partnership, and system changes will inevitably occur, resulting in subsequent revisions to the sustainability plan. Even so, having a structure in place to fall back on can offer library project partners a sense of stability amidst any changes that may arise.

²³ Black, R. (2009). Board to classroom: the role of the corporate and philanthropic sectors in school education. Education Policy and Research Division Office for Policy, Research and Innovation Dept. of Education and Early Childhood Development.



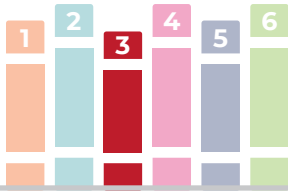
THE BALTIMORE LIBRARY PROJECT STORY

In the Baltimore Library Project, the Weinberg Foundation committed up to six years of operations and maintenance funding for each library as long as the school maintained the salaried librarian position. The Foundation has not only followed through on their original commitment, but they have extended their commitment each year to sustain their investments in Baltimore Library Project facilities (See Part III).



CREATING A SUSTAINABILITY PLAN

- *What are the anticipated long-term needs of the library?*
- *To what extent will the philanthropic partner(s) remain actively involved?*
- *Who will be responsible for various aspects of ongoing maintenance and operations of the library?*



II. BUILDING THE LIBRARY

Once agreements are signed, a library project will transition from conceptually planning the work to tangibly engaging in the work. As demonstrated by the Baltimore Library Project experience, this work leads to beautiful library spaces that are staffed with full-time certified librarians. The libraries are filled with books and technology and they serve as a community space for providing additional services and resources, including literacy and enrichment programming, food, coats, and shoes. All of this work comes together in the building phase of the project.



FORMING AND ENGAGING AN IMPLEMENTATION TEAM

Implementation Teams, as discussed previously, provide oversight of construction projects at each school. It is important to have partner representation from the philanthropic partner, the school district central office, the school itself, the construction team, and the architecture and design firms. The team should begin meeting regularly during the design phase and continue meeting until construction is completed. These meetings can help ensure a common understanding of the plan, clarify roles and responsibilities, and troubleshoot any issues that come up. The team should also regularly communicate with the wider school staff to keep them up-to-date on the planning and construction and how this may impact their work.



THE BALTIMORE LIBRARY PROJECT STORY

The Baltimore Library Project formed Implementation Teams at each school to oversee the construction of the libraries. Key participants on the Implementation Team included:

- *Weinberg Foundation Project Manager*
- *The contracted construction team*
- *City Schools Central Office staff representing Library Services, Partnerships, Design and Construction, and Maintenance*
- *The architect*
- *The designer, and*
- *School principal and librarian.*

The Team’s responsibilities were to plan and review construction timelines, review architectural plans, and strategize as any problems came up. While the Weinberg Foundation initially led the meetings, City Schools ultimately took over this responsibility because of their greater involvement on the construction side. The Implementation Teams meet both prior to and during the construction phase.

In the beginning of the Baltimore Library Project, the team met at least monthly. As the Baltimore Library Project constructed more libraries, partners understood their roles and what was expected of them. One partner identified that the process had become a “well-oiled machine” that required fewer meetings because they knew what to do. The Implementation Teams currently meet three to four times prior to construction and three to four times during the construction period. In the construction phase, Weinberg Foundation staff provide weekly communications to the school to share project updates and discuss logistical issues. Each school has designated contact people who are responsible for different aspects of the project. For example, the librarian is tasked with packing up existing collections and then unpacking collections once the construction is completed.

Personnel changes are expected in a long-term project like this but keeping consistency in assigned personnel as much as possible can be helpful. Initially, different construction managers from City Schools were assigned to oversee the construction at different schools, but over time, it was recognized that having the same construction manager assigned to the Baltimore Library Project worked more effectively. Different people have also filled the Project Manager role at the Weinberg Foundation over the years of the project. Having someone in this position who is detail-oriented and organized is critical because of the many moving parts of this project.

Actively working to build collaborative relationships and having a shared vision strengthened the commitment of the Baltimore Library Project partners and helped keep the work on track. Partners in the 2022 evaluation shared that they felt comfortable bringing up issues during meetings and felt that the other partners were more than willing to get on a call to problem-solve about any issues that came up between meetings.



FORMING AND ENGAGING AN IMPLEMENTATION TEAM

- *Who will participate on the Implementation Team?*
- *Who will assume the leadership role for the team?*
- *How will other distinct roles and responsibilities be identified, as needed?*
- *To what extent, and in what venue, will the team meet?*

DESIGNING THE LIBRARY

DESIGNING THE PHYSICAL SPACE

Libraries should be designed to provide versatile spaces that support a range of learning activities that might include class learning, small group activities, individual learning, pleasure reading, storytelling, immersive environments, and virtual exploration.^{24,25} In addition, libraries need an administrative area that includes the circulation desk, office space, and storage.²⁶

Effective learning spaces should also stimulate the senses.²⁷ This can be done through the use of engaging visuals, varied floor levels, unexpected areas or pathways, and a sense of nature (e.g., organic shapes, texture, greenery, reflective surfaces).

“The kids can sit on the rug, or they can sit on that half-moon orange [bench]...or they can sit in a regular chair. Just a variety of spaces. Or if they’re in a maker station...now we’ve got a big table and the kids stand around and build a little village...Nobody wants to sit in the same place all the time.” – Librarian

²⁴ Farmer, L. S. J. (2017). Managing Facilities. In *Managing the Successful School Library: Strategic Planning and Reflective Practice* (pp. 111–134). ALA Neal-Schuman.

²⁵ Grigsby, S. K. S. (2015). Re-imagining the 21st Century School Library: From Storage Space to Active Learning Space. *TechTrends*, 59(3), 103–106. <https://doi.org/10.1007/s11528-015-0859-5>

²⁶ Maryland State Board of Education. (2020). Standards for School Library Media Programs in Maryland. <https://www.marylandpublicschools.org/programs/Documents/ITSLM/slm/StandardsSchoolLibraryMediaProgramsMD.pdf>

²⁷ Oblinger, D. (Ed.). (2006). *Learning spaces*. Educause.

II. BUILDING THE LIBRARY



Each library design will come with its own unique space considerations, but a project team may still consider having a design package (colors, materials, design elements) to create a unified project brand between libraries. Giving choices for color palettes and design elements helps preserve feelings of autonomy for the future library users who are involved at the design stage, but limiting the scope of the choices can keep this process manageable.

Hundreds of children might use the library each week. When designing for children, choose materials that are high-quality and durable. Additionally, designers should consider maintaining the sight lines from the circulation desk so that the librarian can monitor what is going on throughout the library while checking out books.

You must ensure that the library is compliant with all codes and regulations. The Americans with Disabilities Act requires designing with a focus on making the space accessible for all users, including ensuring that you have adequate lighting as well as enough space for wheelchair users to easily navigate. You will also want to ensure that your designers and architects are knowledgeable about building code requirements in spaces for children. These might include requirements around the temperature at the floor and/or heights of furnishings. Acoustics are another consideration given the many purposes of the library. Well-designed acoustics support group discussions and story-times as well as quiet reading time or individual research.

“You can pour a soda on them. They’re hospital grade. You can just wipe it off. Blood comes out of them. Short of taking a knife and stabbing it, you’re not going to wreck that, and it’s reversible. If something weird happens, you can flip it over and it works the same.”

– Weinberg Foundation employee discussing materials selection for library cushions.

Over time, the materials, furniture, and décor may need replacement. While these may ideally include the branded items selected from the start of a project, practical considerations like cost and availability may limit consistency in orders over time.

INCORPORATING VOICE OF THE END-USER

How will you truly know if you are creating a library that will meet the needs of its users? The only way to do this is to ask the users about their needs and preferences. Think broadly about who your library users are. Schedule time to talk to your librarians, principals, teachers, students, and families, as well as community members. These audiences will have opinions about how best to use the space, design considerations, and what kinds of books and technology are needed.

“I actually really appreciated the Weinberg Foundation’s approach to including the principal as one of the planning partners with this.” – Principal



THE BALTIMORE LIBRARY PROJECT STORY

The physical space of the Baltimore Library Project libraries includes a flexible floor plan with separate areas for study and research, instruction, and group discussion. There are informal reading areas with comfortable seating to encourage independent reading, an administrative area for book check-outs and the librarian’s desk, durable furnishings and fixtures, shelving to accommodate a collection of at least 7,500 books, and a Parent Corner for parents and guardians.

Each Baltimore Library Project library includes unique features designed to inspire the imaginations of library users. These include colorful murals on the walls and ceilings, decorative shades featuring engaging visuals, a wall with the word “welcome” in many different languages, and a vibrant color palette.

The Baltimore Library Project held design charrettes with students at the beginning of the project. They drew pictures of what they wanted to see in the library spaces. These ideas were incorporated into the design and imagination graphics in the Baltimore Library Project libraries. Input from the librarians and staff at each Baltimore Library Project school is sought to ensure that the space is designed to meet the school’s needs.

“She talked about how she would sit in a library before and she couldn’t get inspired. She could not take herself away from the world that she lived in. I mean, I’m paraphrasing basically, but she couldn’t leave that environment that she was in and that she was now in a space in which she could dream, and dream past the life that she knew.”

– Interviewee describing a speech given by a student at a Library Project Grand Opening event



DESIGNING THE LIBRARY

- *Who will be on the design team? What relevant experience do they have, from partnering with schools to designing children’s spaces?*
- *What is the vision for the library’s branded elements?*
- *How will input be obtained from end-users, such as school principals, librarians, students, parents, and community members?*

STAFFING THE LIBRARY

Research has shown that simply having a full-time librarian in a school library is associated with academic gains.^{1,2} The American Association of School Librarians recommends that at a minimum, school libraries should be staffed by one or more full-time certified school librarians and one full-time library assistant, with specific staffing numbers for librarians and assistants determined by the needs and size of the school.²⁸ One study found that library staffing levels of both certified librarians and assistants were significantly related to increases in library services provided and increases in those services correlated with higher standardized test scores.²⁹



THE BALTIMORE LIBRARY PROJECT STORY

Baltimore Library Project libraries are staffed by full-time, credentialed librarians. The librarians also receive \$2,000 per year over four years, totaling \$8,000, to enable their participation in professional development opportunities, which can help the librarians stay current and develop additional skills.

The librarians are supported in their work by a part-time library clerk, who assists the librarian in different ways, such as managing the collections, checking out books, and assisting with technology or instruction. This support allows the librarian greater ability to focus on instructional activities.

Interviewees in the 2022 evaluation identified characteristics of ideal librarians. They recommended that librarians not only are certified, but also have an ability to generate enthusiasm and excitement about reading and strong classroom management skills. Another quality shared was a willingness to work collaboratively with classroom teachers so they can support and supplement classroom activities. Having the assistance of the library clerk is critical to enabling the librarian to engage in these broader activities. In some school districts, librarians have required curricula; in others, the librarian will need to develop and align programming to meet existing educational standards.

“[The] library is only as good as the person you have running it and if you don’t have the right person in it, it is just a space.”
– City Schools Principal

²⁸ American Association of School Librarians. (2019a). Position Statement: Appropriate Staffing for School Libraries. https://www.ala.org/aasl/sites/ala.org.aasl/files/content/advocacy/statements/docs/AASL_Appropriate_Staffing.pdf

²⁹ Achterman, D. L. (2008). *Haves, Halves, and Have-Nots: School Libraries and Student Achievement in California* [University of North Texas]. https://digital.library.unt.edu/ark:/67531/metadc9800/m2/1/high_res_d/dissertation.pdf



STAFFING THE LIBRARY

- *Are certified librarians already in the school(s)? If not, how will certified librarians be hired?*
- *What support will be offered to the librarians, such as a library clerk or assistant?*
- *What professional development opportunities will be provided for the librarian?*

SELECTING COLLECTIONS AND EQUIPMENT FOR A MODERN LIBRARY

School library book collections complement and deepen classroom learning, help students explore their individual interests, and facilitate a love of reading.³⁰ Library collections need to have current and in-depth materials that can support inquiry and exploration activities, represent the school's learning community, and expose students to the broader and more diverse global community.^{30,31} Collections should be available in different formats including print, audio, digital, and graphic versions.³⁰

Today's libraries also require technology to meet students' needs for digital literacy. However, with increasing numbers of schools implementing one-to-one laptop programs, deciding what specific technologies a library needs should be customized with input from the school and the librarian.

³⁰ Philippi, L. & Calzada, B. (2022). Why Collection Development is Important. *Knowledge Quest*, 50(4), 8-13.

³¹ American Association of School Librarians. (2018). School Library Evaluation Checklist. <https://standards.aasl.org/project/evaluation/>

II. BUILDING THE LIBRARY



School libraries can also engage families. Research has found the critical influence of parents on student achievement.³² Providing opportunities for parents to engage in the school and the library can potentially help parents become more confident in guiding their children’s education, see teachers as partners in their children’s learning, and become more engaged in their wider community.^{33,34} One study also found that after participating in a parent involvement program, parents had a renewed interest in their own learning as well as their children’s.³⁴

Take the time to think through library logistics. Each school might have a unique approach to scheduling students for library visits. Providing flexible access, such as opening before and/or after school, can increase opportunities for students to use the library. Another area of consideration is around checking out books. Ideally, there will be a system where the number of check-outs before and after your library project can be evaluated as one potential measure of success. The library team may also consider reevaluating the number of books children can check out, recognizing that this may vary by age level.



THE BALTIMORE LIBRARY PROJECT STORY

The Weinberg Foundation enabled each school to purchase up to 4,000 new books for the library and three books for each student to take home. School librarians at each site worked with a Baltimore Library Project community partner with expertise in library collections in order to select books to meet the students’ educational needs and desires. One librarian talked about the importance of having books that reflect not only the cultural identities of the students in the school, but books that expose students to other cultures with which they might not have experiences. Another librarian recommended only stocking the library with hardcover books because they are considerably more durable. Annual book drives also supplement collections, including a Pay-it-Forward Penny challenge at schools with Library Project libraries that helps purchase books for schools currently undergoing Library Project renovations.

³² Henderson, A.T. & Berla, N., eds. (1994). *A New Generation of Evidence: The Family is Critical to Student Achievement*. National Committee for Citizens in Education: Washington, D.C.

³³ Faucette, E. (2000). Are You Missing the Most Important Ingredient? A Recipe for Increasing Achievement. *Multimedia Schools*, 7(6), 56-61.

³⁴ Hara, S.R. & Burke, D.J. (1998). Parental Involvement: The Key to Improved Student Achievement. *School Community Journal*, 8(2). 9-19.

II. BUILDING THE LIBRARY



Technologies provided in the Baltimore Library Project currently include computers, e-readers, networking stations, charging stations and projector screens. Technology needs change over time, and Library Project partners continue to select and update technologies with input from the schools.

A Parent Corner was created as part of each library with the hope of promoting greater parental participation in their children's education and to meet the needs of parents. The parent area includes adult seating, a computer, and books geared toward parenting interests. In the Baltimore Library Project, the Parent Corners were developed with support from Baltimore's public library system, the Enoch Pratt Free Library; however, they are maintained by the Baltimore Library Project.

The addition of the library clerk has allowed increased flexibility in scheduling in the Baltimore Library Project schools. This has allowed the library to open earlier and/or stay open later to provide students and families with additional opportunities for library access.



FILLING THE LIBRARY

- *Doing a thorough inventory of existing books and technology resources can help identify gaps and needs. Where are the biggest needs in terms of collections and technology?*
- *What resources exist to update collections and technology?*
- *What corporate or community partners can assist with funding for these resources?*

III. IMPLEMENTING THE VISION



- *Developing a process to obtain approval from partners as needed for communications*
- *Ensuring that consents are obtained for any personal stories shared, and*
- *Sharing information about the project with local community organizations and broader philanthropic news organizations (e.g., [Philanthropy News Digest](#)).*



THE BALTIMORE LIBRARY PROJECT STORY

Communications for the Baltimore Library Project are coordinated by the Project Manager from the Weinberg Foundation, with support from the Weinberg Foundation's and City Schools' communication departments. The Baltimore Library Project communications strategies include promotion of their work through local media channels. In addition to having information about the project on the Weinberg Foundation website, they also created a designated [Baltimore Library Project website](#).

Early on, the Baltimore Library Project promoted the initial partnership agreement and plan, even receiving [coverage](#) from a U.S. Senator. In more recent years, the project team typically structures promotional activities around the openings of new libraries and other Library Project-related activities, such as book drives.

Holding Grand Opening events at new libraries can be a memorable way to introduce the students and community to the new library. These events have generated anticipation and excitement and have brought the community together. They typically include a one-hour media event, featuring speeches by the school district superintendent, the principal, students, and other dignitaries. Additional Grand Opening activities focus on students and their families.

These activities have included touring the new library, participating in a community art project like creating a beautiful mosaic to be hung in the library, and providing students with a gift of books that they can bring home. Finally, other community resources may be available during that time, such as a mobile food pantry for parents and family members.



At times, the Baltimore Library Project has filmed students seeing the library for the first time. These [library reveals](#) capture the excitement and enthusiasm of this milestone moment.



ENGAGING IN PROMOTIONAL AND PUBLIC RELATIONS ACTIVITIES

- *Which individuals and/or departments will help develop the communications plan and media kit?*
- *What existing materials can be used?*
- *Who will serve as the project spokesperson?*

WORKING WITH COMMUNITY PARTNERS

Community partners can help support libraries in many unique ways, which vary based on each school community. Engaging with the broader community can bring benefits to the students as well as to the community members.³⁶ Benefits to students include having access to programs, experiences, and resources that might not typically be available to them. These relationships can be mutually beneficial; community partners who engage with students and their schools develop connections with students and have a deeper understanding and investment in the school community.³⁶

If a partner plans to provide direct services within a school and will have contact with children, they will need to follow the district's rules for completing background checks and fingerprinting. Partners who have not worked in schools before would benefit from an orientation that includes information, such as:

- *Identifying their contacts at each school*
- *Reviewing logistics, such as parking, checking in and out of schools, and which bathrooms partners can use*
- *Clarifying expectations, such as whether the school day teachers stay with the class during the activities, and*
- *Sharing information on behavioral management strategies and programs at the school and discussing to handle or report concerns or behavioral issues.*

³⁶ Yorio, K. (2021). School Libraries 2021: Fostering Relationships Between Students and Community Members. School Library Journal. <https://www.slj.com/story/school-libraries-2021-fostering-relationships-between-students-and-community-members>



THE BALTIMORE LIBRARY PROJECT STORY

When considering potential partners, the Weinberg Foundation consults with City Schools to ensure that the partner would be a good fit. If deemed a good fit, the Weinberg Foundation handles the logistics, such as the communications with the partner and the MOU process. Past partners have been brought in to help with basic needs (e.g., food, warm clothing, shoes), as well as with literacy and enrichment programs. Literacy and enrichment programming has included a summer reading program, a literacy program that had students read aloud to dogs, community art projects like the mosaic described earlier, and programs from local museums. The Baltimore Library Project has tried to provide different programs at different schools and then rotate the programs between sites to provide new and fresh offerings to the schools.

“When you see these kids so excited about being able to pick out a new piece of clothing that is theirs, it’s really impactful. It’s joyous.” – Community Partner



WORKING WITH COMMUNITY PARTNERS


- *What are the students’ greatest needs?*
- *How can existing community partners be of service in the library project?*
- *With what additional services and resources can community partners assist?*

PROVIDING ONGOING MAINTENANCE

Even with the best care, funds will need to be allocated for ongoing maintenance. A current recommendation would be between \$50,000 to \$100,000 per year, depending on the age and use of the space. Keep in mind that select libraries might have decorative elements and finishes that are different from what a school system can provide or maintain, so deliberate planning for maintenance, with an understanding of what maintenance funds the school district can realistically supply, is critically important. Setting up a process for how maintenance needs can be identified and addressed can help this run smoothly.

THE BALTIMORE LIBRARY PROJECT STORY

The Weinberg Foundation has an overarching maintenance budget for the libraries to handle upkeep and repairs for up to six years after library construction. Some of this budget is used for annual upholstery and carpet cleaning at each library. Additionally, the project director from the Weinberg Foundation does a yearly walk-through of each library with library staff to determine specific maintenance needs. If an issue arises before the yearly walk-through, the schools contact the Weinberg Foundation’s project director.



PROVIDING ONGOING MAINTENANCE

- *How can the project team ensure advanced plans are made around maintenance?*
- *What is the project’s realistic maintenance estimate? To what extent will current funders and partners be able to support that estimated maintenance budget?*
- *What process will be used to identify, report, and address maintenance needs?*



CONDUCTING EVALUATION ACTIVITIES

The logic model developed in the planning stages can guide the evaluation activities throughout the library project. A key consideration is whether there is sufficient evaluation capacity within the project team or whether an external evaluation consultant would be more appropriate. As previously mentioned, a logic model can be an essential starting point for defining programmatic success. It can also be instrumental in developing an evaluation plan that will measure the activities, effectiveness, and impact of the project. By establishing an evaluation plan and associated tools at the beginning of the project, the team will be able to address the following two types of evaluation questions:

- *Process evaluation questions to determine the extent to which, and how well, the project performed.*
- *Outcome evaluation questions to determine the differences that the project is making for schools, staff, students, and families.*

The evaluation plan also identifies specifically the methods that will be used, what data will be collected, how it will be collected, who will collect the data, who data will be collected from, and how the data will be analyzed. Whenever feasible, the evaluation plan will include all agreed-upon key metrics (process and outcome) that will be gathered throughout the lifecycle of the project. By establishing this from the start, the funders, school districts, and community partners will be aligned on key measures of project success.

Some key considerations for a library project evaluation include:

- ▶ **Institutional Review Board Process** - Projects will likely need to go through an Institutional Review Board (IRB) process if it includes the collection of original data and/or use of existing data collected by a school district. This review process ensures that evaluation activities meet guidelines for protecting participants' privacy, limit undue burden on participants, and ensure that an informed consent process will be used with participants. Institutional Review Boards typically meet on a regular basis (e.g., monthly) so project teams will need to consider the timeline for developing materials required for the IRB submission and any revisions and re-review needed. As part of this process, teams will typically need to submit an evaluation overview and protocol, planned data collection tools (e.g., surveys, interview guides), informed consent forms, and any advertisements for participant recruitment.
- ▶ **Planning for Data Collection** - The project team will need to allot the appropriate amount of time for data collection efforts. Importantly, data collection can be particularly challenging during certain time periods in the schools, such as at the start of the school year, before winter holidays, and the time around standardized testing. School districts and/or IRBs may have restrictions on data collection activities that take place during the summer months or stipulate whether instructional time can be used for data collection.



THE BALTIMORE LIBRARY PROJECT STORY

Evaluation activities for the Baltimore Library Project have included yearly activities during project years one through three as well as a more recent evaluation conducted in 2022. Highlights from the years one through three evaluation included:

- *In a four-year period, book checkouts in Library Project schools increased by 400%.*
- *Reading fluency scores among third graders in two of the first three Library Project schools increased from 33% of students at benchmark to 64% at benchmark.*
- *Library Project students in the third grade were almost three times as likely to meet reading fluency proficiency standards as students in comparison schools.*
- *The first three Library Project schools outperformed more than 120 Baltimore City Public Schools on PARCC tests in reading proficiency.*

The 2022 Evaluation focused on the extent to which best practices were implemented in Library Project and learnings around the funding and partnership model. Key findings included:

- *The Library Project may be associated with positive school climate. Librarians, administrators, and others noted how excited students get about the space. Although causation cannot be inferred from the statistical analyses conducted, it is notable that compared to students in reference schools, students in Library Project schools rated all four aspects of school climate (i.e., school community, school environment, school relationships, and school safety) significantly higher. Community partners contribute to school climate by providing enrichment and literacy programs as well as access to needed resources, such as food, coats, and shoes.*
- *The Library Project may also be making a difference in student academic performance. Interviewees noted that Library Project libraries help get students excited about books and reading. The quality and depth of the collections were often noted as strengths of Library Project libraries. Additionally, although causation cannot be inferred from the statistical analyses conducted, compared to students in reference schools, Library Project schools performed at a significantly higher average school performance level in English language arts (ELA) on Maryland's standardized assessment, and had a significantly higher percentage of students in the school proficient in ELA.*
- *The Library Project was identified by all project partners as a productive and successful long-term partnership. Factors attributed to success included the vision and leadership guiding the partnership as well as the ongoing commitment and collaboration between partners. Many of the findings and recommendations about the partnership model are shared throughout this Toolkit.*



CONDUCTING EVALUATION ACTIVITIES

- *How can evaluation activities help ensure and determine the success of the library project?*
- *What is the existing evaluation capacity in the partner organization(s)?*
- *How will your team determine if and when to engage an external evaluation partner?*

SUPPORTING LONG-TERM SUSTAINABILITY

Planning for the long-term sustainability of the project is one of the greatest challenges a library project will face. As previously mentioned, it is important to think about this from the start.

Some of the key factors for sustainability include:

- ▶ **Solidifying and diversifying funding streams** - On the philanthropic side, it is essential to determine the long-term commitment to the project and ensure availability of reserved funds. Ongoing efforts to secure additional funding through diversified sources can be essential to providing funding options over time. Finally, even with clear plans, it is essential to monitor upcoming changes in legislation and funding for public schools at the local, state, and federal levels that might positively or negatively impact the library project.
- ▶ **Institutionalizing processes and programs** - Ideally, the library project will remain viable for years to come, even in the face of potential leadership and staffing changes at the partner organizations. Delineating the project-related roles and responsibilities related to the job title, rather than keeping project-related knowledge solely in the hands of the person who holds the title, can be an important step to ensuring this institutionalization.
- ▶ **Sharing evidence of the project's benefits** - Showing the positive effects of the library project on students and the broader school community can keep partners and funders motivated, engaged, and committed to the project. To keep a wide range of partners equally engaged, consider highlighting their specific contributions, including those of the school district, implementation team, library and school staff, community partners, funders, students, and families.
- ▶ **Maintaining ongoing communication** - Ensuring that lines of communication are open and consistent helps to foster a continued sense of belongingness to the project and allows issues to be addressed early.



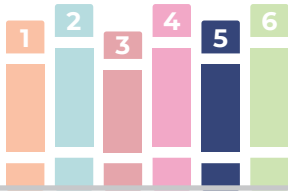
THE BALTIMORE LIBRARY PROJECT STORY

The Weinberg Foundation pledged up to six years of operations and maintenance funding for each library; however, the reality is that the Weinberg Foundation has remained committed to the partnership with each school, as needed, beyond this time period because of their deep commitment to this work. The Foundation staff has recognized how challenging it would be for City Schools to maintain the library spaces at their current level of funding, and they have made the choice to stay involved year after year.



SUPPORTING LONG-TERM SUSTAINABILITY

- *To what extent does the sustainability plan originally developed still seem viable?*
- *What modifications need to be made in order to support the project's long-term success?*



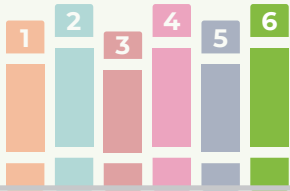
CONCLUSION



The Baltimore Library Project believes in bringing children the opportunities they deserve. The Weinberg Foundation and Baltimore City Public Schools are proud of this commitment to improving literacy throughout the district. There are many more children across the United States who could greatly benefit from a library project. This Toolkit was designed to provide necessary guidance to begin new library projects; it is a starting point and the process should be customized to best meet the needs of each community.

The Baltimore Library Project has demonstrated that this work is possible with a clear shared vision, supportive leadership, and a collaborative partnership team. While the process hasn't always been simple, the Library Project has always been rewarding.

The Harry and Jeanette Weinberg Foundation wishes funders, districts, and communities the best of luck in bringing library projects to communities throughout the world.



APPENDIX

APPENDIX A.

SAMPLE MEMORANDUM OF UNDERSTANDING

**Amendment to the
Memorandum of Understanding Between
[School Board] for the
[School District] &
[Funder]
[Dates]**

INTRODUCTION

The purpose of this Amendment (Amendment) to the Memorandum of Understanding (MOU) is to describe the process to be undertaken by [School Board] (Board) for the [School District] (District) and [Funder] (FUNDER) to renovate up to X libraries (School Libraries Project). [Fiscal Agent Name] (“**FUND**”) will be the fiscal agent for FUNDER’s grant for the benefit of (District). The schools that are currently the beneficiary of such library renovations are identified as the following:

1. (School 1)
2. (School 2)
3. (School 3)
4. (School 4)
5. (School 5)

As the other libraries are identified, they will be incorporated by reference into this Amendment and documentation attached to reflect such incorporation. An additional MOU for buildings not owned by [School District] has also been signed by applicable parties.

Board and FUNDER hereby amend the MOU as follows:

- A.** The Parties agree that the effective date for purposes of this Amendment for the remaining library projects commences on [DATE].
- B.** The parties’ goal is to complete the renovation and outfitting of the School Libraries Project by the first day of school of the designated year, as agreed upon by the parties. Spaces will not be available for school usage until all parties have agreed the space is completed.
- C.** The total funds already paid and/or committed by funders *other than FUNDER* to the libraries named is shown in Exhibit 1 (*not provided in toolkit*) and summarized as follows:

[Add detailed funding terms]

TERMS AND CONDITIONS OF AGREEMENT

Now, therefore, in consideration of the above stipulations and to define the process for implementing the School Libraries Project the parties now agree as follows:

1. For each of the libraries, (District) will provide no less than three (District) staff members to coordinate those (District) activities required by this MOU. The three representatives will

be named officially by the Chief Executive Officer, or designee of (District) and will, as able and appropriate, include, but not necessarily be limited to, the following persons:

- (a) (Day-to-day project support);
- (b) (Liaison to this project); and
- (c) (Project design oversight, bidding, contract award, construction supervision and coordination with [Designer])

2. The overall work is subject to review, but only (District) funded portion of the work must be competitively bid.

(a) (District) will ensure that no exposed asbestos or other environmental hazards will be present anywhere in the space. (District) will, at its sole cost and liability, identify, remove, and dispose of any hazardous materials substances in the present library spaces or in spaces that may be impacted by FUNDER's work. This environmental abatement will be completed prior to the start of FUNDER's work and a letter of confirmation of abatement completion will be provided to FUNDER for each space before FUNDER begins its work (with its partners).

3. FUNDER, through the School Libraries Project, will participate with (District) in the oversight of the design and construction required for interior design changes, and the purchase and installation of furniture, fixtures, and equipment for the School Libraries Project (the "Work"). [Designer] has been selected by FUNDER to execute interior design work. [NAME] is the chief project lead for [Designer]. In addition, [Designer] and (District) will each have a project manager assigned to each School Library Project to ensure on-time, on-budget completion of each project. At the discretion of FUNDER and/or [Designer], one individual may be assigned as project manager for the libraries and such determination of the project manager will be communicated to (District) representatives detailed herein. At present time, the FUNDER preferred project manager is [NAME]. The FUNDER's preferred architect is [NAME], under the direction of [NAME].

4. If necessary and/or requested by FUNDER or [Designer], one of the (District) assigned representatives to this project will advise FUNDER and [Designer] on procedures required to obtain (District)' review of design and interior construction documents and will facilitate prompt (District) review and approval of these documents. (District) will use its best efforts to review and decide upon approval of each such submission by no later than 30 days of submission.

5. For all of the Work of FUNDER, (District) will be responsible to secure any and all permits prior to the start of interior work.

6. FUNDER is requesting that the [Food Bank] locate a food pantry in each school as near as is practicable to the library in each school. To the extent practicable, (District) will use its reasonable best efforts to implement this plan. FUNDER and (District) believe that having a food pantry near each library will provide visiting parents, grandparents, and guardians an opportunity to visit the library, receive a complimentary cup of coffee and newspaper, and become more integrated into the community of the school.

7. FUNDER will attempt to bring other funding partners to the project. FUNDER already is in touch with the [Current Partners] and others concerning this project. Additional sponsors are supporting the project in many ways, including financial support, in-kind donations, discounts and the like.

8. FUNDER will provide a detailed budget for work that will be provided to each individual library, and FUNDER agrees to pay each such budget in full, either itself and/or with other funders that FUNDER secures, subject always to the FUNDER 30 % limitation stated in Paragraph C of the Introduction.

(a) (District) and FUNDER will agree on a work schedule for each of the school library projects.

(b) FUNDER and (District) will agree on a regular reporting process so that FUNDER/[Designer] regularly can report to (District) (to the Director of Facilities and Design for (District)) on the progress of the work and solicit guidance, assistance, and help as necessary in order to move the project forward.

(c) For any work not funded by QZAB or (District) funds and not a part of the competitively bid contracts, FUNDER and [Designer] will provide to (District) a list of all contractors and subcontractors who will work in the schools and a schedule for the Work.

(d) FUNDER will chair an advisory committee for the project, and (District) agrees to participate therein.

9. It is the responsibility of FUNDER and [Designer] to make certain that its employees, agents, volunteers, and contractors who have contact with students be fingerprinted and have a background check in compliance with [laws/statutes of governing jurisdiction].

Any and all current and future employees of FUNDER and [Designer] who have direct contact with students must have a criminal background check and fingerprinting conducted by the Human Capital Office of the (District) before beginning work in a (district) school. Previous background checks will not be accepted. The fee for the background check shall be facilitated by the School Library Project and paid by the FUND by check or money order at the time the fingerprinting is performed. No employee can begin work in a (district) school until results have been received.

Employees of FUNDER and [Designer] who will be placed in a (district) school but will not have direct contact with students must have on record a Criminal Justice Information Service ("CJIS") and NCIC background checks. Copies of the background checks must be forwarded to (District) before services can commence. Should any employee be flagged during the term of this agreement, the FUNDER and [Designer] shall contact (District) within 24 hours of notification.

FUNDER and [Designer] shall at all times be compliant with the [laws/statutes of governing jurisdiction] that states that a person who enters a contract with a Board of Education or a nonpublic school may not knowingly employ an individual to work at a school if the individual is a registered child sex offender. If a registered child sex offender is employed by FUNDER and [Designer], FUNDER and [Designer] are prohibited from assigning that employee to perform management, delivery, installation, repair, construction or any other type of services on any (District) property.

10. For the purposes of this MOU, the Work excludes funding for staffing in the library. This aspect of the renewal of the libraries will be addressed through a separate agreement with (District), and will be incorporated by reference and will be attached as an addendum to the instant MOU upon execution.

11. The fiscal agent for the project grant from FUNDER shall be the FUND. For the purpose of this Amendment, FUNDER deposited with FUND an initial \$200,000 as of October 7, 2011 and an additional \$1,000,000 for every year since. After execution of this Amendment, FUND will release funds to begin project payments assuming all FUND requirements are met and payment amount is approved by FUNDER representative. After the Amendment's formal execution by the parties to it, a copy of the *Fiscal Sponsorship Agreement* between FUNDER and FUND will be provided to (District).



- (a) FUND shall provide FUNDER with monthly financial reports. Annual progress reports and a final report, each of which must include a narrative portion and a financial portion including verification provided by (District) to FUND of (District)' dollars spent toward the renovation of the identified libraries, expressed in United States Dollars and prepared in accordance with generally accepted accounting procedures ("GAAP"). A copy of all reports may be sent to (District), but must detail (District)' use of Grant funds and must be signed by an authorized officer of FUND and submitted according to the following schedule:

Report	Scheduled of given year
Annual – Year 1	TBD
Annual – Year 2	TBD
Annual – Year 3	TBD
Annual – Year 4	TBD
Final	TBD

(b) Each report must include a statement certifying that all Grant funds have been expended in accordance with the Grant purpose and all terms of this MOU. It is imperative that all reports be timely submitted to FUNDER. If FUND anticipates any potential issue regarding report timeliness, FUND agrees promptly to notify FUNDER, and explain the reasons for the potential delay, so that the matter can be resolved. Failure to meet these requirements for timeliness and notification may result in various FUNDER actions, up to and including termination of this Grant.

(c) If written reports are not submitted to FUNDER on a timely basis, then FUNDER may withhold further payments, if any, to (District) or FUND, under this Grant or any other FUNDER Grant, until the situation has been fully rectified, and FUNDER may cease awarding any new grants to (District) or any affiliate of (District).

12. Grant monies will be distributed by FUNDER in accordance with the concept budget that will be mutually agreed upon by [Designer], FUNDER and (District), and attached as **Exhibit 1** of this MOU (*not provided in this toolkit*). This general budget will be updated to show FUNDER's budget for each school library at the time the cost of construction is determined. A full report of this spending will be submitted to (District) at the conclusion of the Project. NOTE: this will change when the exact budgets of the schools are provided. At its discretion and after the successful completion of the libraries covered by this Amendment, FUNDER may offer to perform substantially similar work for additional libraries.

13. Prior to the start of a school's project design, FUNDER may interview schools in order to better understand school community, demographics and needs as shown in **Exhibit 2** of this MOU.

14. This MOU is legally binding and is enforceable by both parties even if there is a change in leadership in either party or both parties.



In recognition of the above stipulations and terms of Agreement, the parties hereby approve this MOU.

[FUNDER]

[SCHOOL DISTRICT]

Name, Title

Name, Title

Date

Date

Name, Title

Name, Title

Date

Date

APPROVED FOR FORM AND LEGAL
SUFFICIENCY
THIS _____, DAY OF _____, 20XX

Office of Legal Counsel
[School District]

[Fiscal Agent]

Name, Title

Name, Title

Date

Date

Exhibit 2

In initiating the capital project, each school may be asked to fill out a short form to help guide the design and implementation process. While it can be filled out by the librarian, the principal must sign off and approve before submitted to FUNDER. Questions will include:

1. What is your dream for your existing space to best serve your students? What kind of spaces would you like to see in the library? Do you have any special furniture needs?
2. What special populations do you have (e.g. ELL students, immigrant populations, special needs, below-grade level learners, etc.) and how can their needs be better met in the library through the renovation?
3. How can the library renovation enhance your instruction differently? Is there anything you need in the library you don't have, or don't have enough of (e.g. Smart boards, manipulatives, etc.)
4. Are there changes that could be made to the physical space or book collection that would help you address changes to the common core standards?
5. Technology is changing the way students learn and is quickly opening up new ways to teach. Are there technological dreams you have for the library? (e.g. e-readers, laptops, Apple computers, networking stations that allow simultaneous work on laptops, etc.)
6. Are there ways the library could be used to enhance your school –community partnerships, either for in-school instruction, after-school or summer programming, or parent and community programs?
7. What kind of staffing would you like for the library in addition to what you already have, and please explain why additional staffing is needed and what you could achieve with additional help.
8. Are there professional development opportunities you would like to take advantage of for your library but cannot due to financial resources. If so, please explain what they are and how they would benefit the library and school.

APPENDIX B. SAMPLE OPERATING AGREEMENT

Operational Agreement
[Fiscal Agent]
and
[Funder]
and
[School Name]
[DATE]

INTRODUCTION

The purpose of this Operational Agreement (**OA**) is to describe the operational process to be undertaken by the [Fiscal Agent] (**Fund**) and [Funder] (**FUNDER**) to implement the Memorandum of Understanding (**MOU**) agreement and associated Addendum with [School District] (District) to provide additional operating support to [School Name] (**School**) as part of the School Library Project (the **School Libraries Project**), which is also undertaking the physical renovation of the [School] library through a separate MOU agreement with (District).

The Fund, FUNDER, and [School] agree as follows:

A. FUNDER desires to provide, in cooperation with the Fund and [School], an operating grant that will span up to four years to provide additional staff support for a School Library Clerk position plus professional development activities that will enhance the utilization of the school library renovated with FUNDER funding.

B. The total funds already paid and/or committed by the school for a full-time librarian, any additional library staff support and any professional development for the librarian at the beginning of SYXX-XX is \$ _____ (the “*baseline funding*” or “*baseline funds*”).

TERMS AND CONDITIONS OF AGREEMENT

Now, therefore in consideration of the above stipulations and to define the process for implementing the School Libraries Project operating support the parties now agree as follows:

1. As outlined in the Addendum with (District), [School] and the Fund, as the fiscal agent, will ensure that funds provided by FUNDER will only supplement the baseline funds. [School] agrees to maintain its baseline funding.

2. FUNDER and [School] will split costs equally, each paying 50% of related costs over an average of a four year period. A job description for the Library Clerk is attached as **Exhibit A** (*not provided in this toolkit*).

(a) As outlined in the MOU and associated Addendum with (District), the parties agree that as a result of this grant providing additional staffing, every [School] student will visit the library at least once a week throughout the school year.

(b) The parties agree that the existing librarian and the additional Library Clerk will maximize the partnerships FUNDER is putting in place as part of the School Libraries Project, such partnerships including, but not limited to, the [Food Bank] pantries, [Current Partners] and others.

Operational Agreement
[Fiscal Agent]
and
[Funder]
and
[School Name]
[DATE]

INTRODUCTION

The purpose of this Operational Agreement (**OA**) is to describe the operational process to be undertaken by the [Fiscal Agent] (**Fund**) and [Funder] (**FUNDER**) to implement the Memorandum of Understanding (**MOU**) agreement and associated Addendum with [School District] (District) to provide additional operating support to [School Name] (**School**) as part of the School Library Project (the **School Libraries Project**), which is also undertaking the physical renovation of the [School] library through a separate MOU agreement with (District).

The Fund, FUNDER, and [School] agree as follows:

A. FUNDER desires to provide, in cooperation with the Fund and [School], an operating grant that will span up to four years to provide additional staff support for a School Library Clerk position plus professional development activities that will enhance the utilization of the school library renovated with FUNDER funding.

B. The total funds already paid and/or committed by the school for a full-time librarian, any additional library staff support and any professional development for the librarian at the beginning of SYXX-XX is \$ _____ (the “*baseline funding*” or “*baseline funds*”).

TERMS AND CONDITIONS OF AGREEMENT

Now, therefore in consideration of the above stipulations and to define the process for implementing the School Libraries Project operating support the parties now agree as follows:

1. As outlined in the Addendum with (District), [School] and the Fund, as the fiscal agent, will ensure that funds provided by FUNDER will only supplement the baseline funds. [School] agrees to maintain its baseline funding.

2. FUNDER and [School] will split costs equally, each paying 50% of related costs over an average of a four year period. A job description for the Library Clerk is attached as **Exhibit A** (*not provided in this toolkit*).

(a) As outlined in the MOU and associated Addendum with (District), the parties agree that as a result of this grant providing additional staffing, every [School] student will visit the library at least once a week throughout the school year.

(b) The parties agree that the existing librarian and the additional Library Clerk will maximize the partnerships FUNDER is putting in place as part of the School Libraries Project, such partnerships including, but not limited to, the [Food Bank] pantries, [Current Partners] and others.

3. FUNDER will provide [School] an additional grant of \$2,000 per year (total \$8,000 over 4 years) for professional development to allow the librarians to attend the [professional development opportunities], and to provide professional development for teachers in the school to maximize use of the library and technological resources. A pre-approved menu of professional development services has been attached as **Exhibit B** (*not provided in this toolkit*). [School] may choose any of these options and submit expenses to the Fund for reimbursement.
4. The Library Clerk will assume a traditional teacher/librarian 10-month schedule. As such, the salary information below assumes 190 days (42 weeks) of work. Each clerk will receive 5 paid sick days. Each clerk will receive paid days off for holidays, winter and spring breaks when they fall on a day the clerk would normally work. For example, a clerk working on Tuesday, Wednesday and Friday would be paid for three days over the Winter Break, but would not be paid for a Monday or Thursday holiday day.
5. The Library Clerk will be an employee of [Fiscal Agent], on 10-month per school year (42 week) renewable contract. Should the contractual relationship between FUNDER and [Fiscal Agent] change such that [Fiscal Agent] ceases to act as fiscal agent for this grant, FUNDER and [School] shall work with each other on an alternative approach.
6. The Library Clerk shall perform all library-related tasks under the supervision and direction of the Librarian. The Library Clerk shall be an employee of [Fiscal Agent]; however, the Librarian shall cooperate with [Fiscal Agent] so that all ongoing “human resources” and evaluation requirements are met. [School] shall be responsible to lead the process that results in the hiring of the Library Clerk; such responsibility shall include, but not be limited to, recruitment, interviews, and selection (selection subject to, among other things, [Fiscal Agent]’s background checks and completion of necessary forms) of the individual to serve as Library Clerk. Once hired, the Library Clerk shall submit to [Fiscal Agent] bi-weekly time sheets approved by the supervising Librarian.
7. The Library Clerk shall be paid no more than \$X/hr. and no less than \$X/hr. The Clerk shall work a minimum of 19 hours and a maximum of 29 hours. Based on discussions with [School], the parties hereby agree to an initial salary of \$X/hr. for 20 hours a week. For individuals staying in the role across multiple school years, there shall be a X% raise each year. The breakdown of salary per school year, and the portion to be paid by [School] and FUNDER each year is shown in Exhibit C.
8. [School] will be responsible for creating a request for [Fiscal Agent] through [procurement system] for the portion of the salary the school is responsible for paying each year; [Fiscal Agent] is listed under “Contractors” as “[Fiscal Agent].” To expedite the process, each July, [Fiscal Agent] will provide [School] a quote outlining costs for that school year. The principal and his/her business manager will notify [Fiscal Agent] once the requisition form has been submitted and will work with [Fiscal Agent] to ensure that a Purchase Order for the salary amount is issued in a timely manner. The start of the Library Clerk’s annual contract will be predicated upon prior receipt of this purchase order.
9. This OA relates solely to the items outlined above and does not encompass or supersede any agreements related to capital renovations to the library. The renovation aspect of the School Libraries Project, as well as the additional operating support, are addressed through separate agreements with [district], but are incorporated by reference in this OA. This OA will be included as an attachment to the additional operating support Addendum upon execution.
10. At the end of each school year, and in order to release any subsequent payments, [Fiscal Agent] shall submit to FUNDER a report outlining the utilization of the [School] library, how it compared to previous year’s utilization, plus an accounting of expenditures for both the school’s



contribution to library resources (staff, professional development, and other) and the use of the FUNDER grant money. A similar type of report shall be submitted shortly after the end of the final grant year. [School] shall fully cooperate with requests for information to complete this report from [Fiscal Agent] and/or from FUNDER.

11. As outlined in the Addendum with (District), a change of leadership in a party shall not excuse any failure of that party to perform its obligations under this OA.

(a) As outlined in the Addendum with (District), if at any time after the first grant installment, FUNDER determines, in its sole and absolute discretion, that the prior year's operating funding has failed to demonstrate sufficient success to justify an additional year of funding, then FUNDER shall have the right to terminate its funding and shall not be under any further obligation to [School] or any other party.

In recognition of the above stipulations and terms of Agreement, the parties hereby approve this OA.

FUNDER

Name and Title

Name and Title

Date

Date

[Fiscal Agent]

Name and Title

Name and Title

Date

Date

[School]

Name and Title

Date

Exhibit C

Note: this table reflects estimates from SY12-13

[School]--Assumes \$10/hr, 20hrs/week for 42 weeks				
	Year 1	Year 2	Year 3	Year 4
Salary	\$ 8,400.00	\$ 8,652.00	\$ 8,911.56	\$ 9,178.91
FICA (1)	\$ 642.60	\$ 661.88	\$ 681.73	\$ 702.19
W/C	\$ 28.56	\$ 29.42	\$ 30.30	\$ 31.21
SUI	\$ 824.50	\$ 824.50	\$ 824.50	\$ 824.50
LT/ST Disab				
Total	\$9,895.66	\$10,167.80	\$10,448.09	\$10,736.81
Year	[Funder] Cost	[School] Cost	Percentage split	Total:
1	\$9,895.66	\$0.00	100/0	\$9,895.66
2	\$3,558.73	\$6,609.07	35/65	\$10,167.80
3	\$3,552.35	\$6,895.74	34/66	\$10,448.09
4	\$3,617.44	\$7,119.37	33/67	\$10,736.81
Total:	\$20,624.18	\$20,624.18	---	\$41,248.36

APPENDIX C. SAMPLE MAINTENANCE AGREEMENT

**Memorandum of Understanding Between
[School Board] for the
[School District] &
[Funder]
[Fiscal Agent]
August 1, 2017
Maintenance and Repair Fund for the Baltimore Elementary and Middle School Library
Project**

THIS AGREEMENT is made as of August 1, 2017 by and between [School Board] for the [School District] and [Funder].

WHEREAS, the Board and [Funder] have heretofore implemented the terms of a Memorandum of Understanding (MOU) to support maintenance and repair work for the Baltimore Elementary and Middle School Library Project, with [Fiscal Agent] as the fiscal agent for [Funder]'s grant.

THEREFORE, the parties hereby developed this MOU to identify terms, conditions and parameters for the operations of the Maintenance and Repair Fund.

Purpose of the Maintenance and Repair Fund

[FUNDER] has established a Maintenance and Repair Fund for the mutual use of School District and the Funder. Funds are exclusively for libraries renovated as part of the Baltimore Elementary and Middle School Library Project (known as Library Project sites).

The total amount provided by the Funder is \$X. These funds will be held and managed by the [FISCAL AGENT], in accordance with a separate contract.

School District will supplement the Funder's contribution with \$X allocated in the Facility, Maintenance and Operations budget each school year for three (3) years (school years 2017-18, 2018-29, 2019-20). At some time prior to the start of the 2020-21 school year, but no later than July 1, 2020, the parties will review the terms of this Agreement and the Agreement will be updated as necessary. Funds will be held within the budget account until May 30th unless used to support a repair or maintenance project as part of a Library Project site. Funds will be managed by School District and approved by the School Board each year.

In relation to budgeted funds provided by [School District]:

- School District support schools with two different funding sources as outlined below – General Funds and Capital Funds.
- General Funds support repair and maintenance (i.e. repairing broken windows, glass panes, painting, etc.). Repair and maintenance does not include window blinds and furniture. Access to funding in the general funds is through a work order process and assessment based on scope of work and budget. These projects are completed as the work order is reviewed and can be processed with limited delays. Projects may be impacted by budgetary constraints and are managed by the Facility, Maintenance and Operations Department.
- State and local capital funds are used for construction and renovations (capital costs). This funding goes through a yearly Capital Improvement Plan (CIP) review process, with approval by the [School Board], [City Planning Commission], and Public School Construction Program. These funds are not quickly accessible and are bound by time constraints, facility utilization and past investments in a space. The dollar amount for projects utilizing state and local capital funds is generally higher and is not supported by the Facility, Maintenance and

Operations Department. Projects scheduled in the CIP are implemented within 2 years of approval by the School Board.

Based on this designation, School District will provide financial and repair maintenance support of the libraries renovated as part of the Baltimore Elementary and Middle School Library Project in relation to repairs and maintenance; any significant renovation and construction projects will be considered through support of State and local capital funds. Below, outlines how each entity will use the maintenance funds.

Use of the Maintenance and Repair Fund

The Funder may use the Maintenance and Repair Fund in three ways:

1. Directly by the Funder in response to maintenance/repair requests in Library Project sites that are either not generally covered by School District' General Funds maintenance and repair budget and/or are for specialized, non-standard School District design elements. Such requests may include, but are not be limited to: furniture replacement, cleaning (of renovated space or item in the space), technology updates, supply purchases (relevant to a repair such as paint), tile repair, or lightbulb replacement.
2. Through requests by School District to support non-fixed costs associated with maintenance/repair of Library Project sites as identified by, or during regular joint library walkthroughs, designated Funder and School District staff. Funds may be used to purchase materials or items needed to complete a repair (such as a light fixture or shade) that is being done by a member of the School District Facilities Department and/or a qualified contractor as selected by the Funder.
3. In conjunction with a capital project or expense that needs to be completed by School District within a Library Project site.
 - a. Repairs over \$X would be considered on a case-by-case basis, and Funder contributions would not exceed 30% of the total repair cost. School District' contribution may be impacted by the district-wide budget.
 - b. When Funder is the sole Funder on a small project (under \$X), the Foundation would have the opportunity to select the contractor completing the task, pending the Executive Director of Facilities at [School District], or a designee, review and approval of the project scope and vendor choice. Note: The eligible on-call pool of vendors and or an agreed Funder vendor to complete such a project will be identified and managed by the Foundation, as School District on-call list must be rotated per Board procurement policies.

In establishing the Maintenance and Repair Fund, the following parameters will be applied by the Funder in support of the fund:

- Requests for funds may begin one year after the opening of the renovated Library Project, or at the conclusion of warranty periods for items in the media center and contractor agreements, whichever is later.
- When considering a request, Funder may ask the Library Project site to provide a 1:1 match on repair costs or may decline the request. School funds should be considered prior to Funder funding consideration for repairs such as but not limited to: replacing damaged technology or



furniture, or wall repairs damaged by a student/staff. If the school cannot provide the match, additional discussions/approaches may be considered.

- Note: As outlined in the annual Operating Agreements signed between [School District], individual school sites, and the Foundation, each school is prepared to contribute up to 5% of total initial project construction costs, divided over 4 years, towards the general upkeep and maintenance of the Library Project site.
- [Fiscal Agent] will provide regular balance and expenditure reports to both [School District] and the Funder.
- All fund usage over \$X (or \$X or \$X – amount can be negotiated) will be with the full knowledge of both parties and must be approved by both the Executive Director of Facilities at [School District] and the Baltimore Elementary and Middle School Library Project Program Director (and/or the designated representative of each). Approval for repairs for items not generally covered under normal maintenance by [School District], such as repair of furniture or replacement of equipment/technology will remain the sole designation of the Funder. In all cases, the Funder has final authorization to any repairs covered by the fund, including scope of project that are solely funded by the Foundation.
- Every six-months, staff from Funder, as well as the design and construction Consultants, School District' construction and maintenance staff, and other designated parties will have a scheduled walk-through of each Library project site. Following walkthroughs, all concerns will be documented, discussed, and assigned to the relevant party to address. Regular work order status updates will also be provided to Funder. School District will provide financial and repair maintenance support directly within the Library Project sites. Due to lack of scope, items not involving the design and construction of the Library Project spaces will not be covered. These items, however, may be considered with other capital projects scheduled at the school or for future work to be submitted in the CIP annual review.
- The designated architect team will provide a documented Building Maintenance Plan (BMP) for the media center space upon turnover of the completed project. The BMP will contain frequency of recommended manufacturer and preventive maintenance work of mechanical and other equipment requiring maintenance. Use of funds from the Maintenance and Repair Fund may be used to support preventive maintenance per the BMP.
- Use of the Maintenance and Repair Fund may, at the Foundation's sole discretion, be limited to those schools with an active library program. Such programs would consist of weekly student visits to the spaces and a full-time certified librarian on staff.

School District may use their matching funds to support the Maintenance and Repair Fund in two ways:

1. By setting aside \$X from Operations' general funds budget into an account to support the Library Project sites maintenance and repairs. Each year, funds allocated through Operations' general funds budget, will be used to address requests identified through scheduled tours and site visits, and regular walk thru conducted by School District facility staff, Funder staff and consultants.
2. To support the BMP which include recommended manufacturer and preventive maintenance work for mechanical and other equipment requiring maintenance. Use of funds from the Maintenance and Repair Fund will be used to provide for proper preventive maintenance per the BMP.



Repairs over \$X will be considered by School District in partnership with the Funder; however, School District support will be based on repair related projects only. Capital related projects as defined in this document will be considered through the Capital Improvement Program process funded with State and local funds.

In support of the Maintenance and Repair Fund the following parameters will be applied to School District' contribution:

- School District will budget \$X three (3) years (school years 2017-18, 2018-29, 2019-20) within the district budget to support the maintenance and repair of the Library Project sites. Following the 2019-20 school year, School District will review the agreement and approach to funding. Funds will be appropriated each budget year in the Operations budget by the COO, in a separate budget line item, which is approved by the Baltimore City School Board. The designated School District' funding will remain with the school district and may be in-kind with skilled labor to perform repairs. The School Board passed the budget for school year (SY) 17/18, on May (date) therefore, these funds will be approved through this MOU agreement between the Funder and the CEO. For future school years, the funds will be approved through the budget process by the School Board.
- Spending summaries will be made available upon request and contribution amounts will be reviewed annually. School District' funding may be released back to the general funds by May 31st of each year should at that time remaining funds are deemed unnecessary. If funds are deemed unnecessary by May 31st, School District will inform the Foundation and provide a summary of the balance of the account and acknowledgement that all outstanding repair work identified at the Library Project sites are completed.
- Requests for funds may begin one year after the opening of the renovated Library Project, or at the conclusion of warranty periods for items in the media center and contractor agreements, whichever is later.
- School District' budget analyst in the Operations division will provide regular balance and expenditure reports to both School District and the Funder.
- All fund usage will be with the full knowledge of both parties. All projects will be approved by the Executive Director of Facilities at [School District] and the Baltimore Elementary and Middle School Library Project Program Director (and/or the designated representative of each). The School District has final authorization to any repairs covered under School District' budgeted funds, including scope of project that are solely funded by the district.

Except as specifically Amended herein, all of the terms of the MOU dated August 1, 2017 remain in full force and effect, as previously amended.

In recognition of the above stipulations and terms of Agreement, the parties hereby approve this MOU.

FUNDER, INC.
NAME, President

[SCHOOL DISTRICT]
NAME, Chief Executive Officer



Date

Date

NAME, Exec. V.P.

NAME, Chief Academic Officer

Date

Date

APPROVED FOR FORM AND LEGAL
SUFFICIENCY
THIS _____, DAY OF _____, 2017

Office of Legal Counsel
[School System]

FISCAL AGENT

NAME, President & CEO

Date

