

# Comprehensive School Library Audit Timeline

This 26-week timeline concludes in early December 2026.

## Phase 1: Fiscal Analysis (8 Weeks)

- **Objective:** Collect and review financial transactions for school library transactions
- **Scope:** Sample of 12 districts and 3 charters.
- **Key Focus Areas:**
  - **Funding Streams:** Reviewing all school library funding streams including state funding (WPU), federal grants (Title I, Title IV) etc.
  - **Receipts:** Reviewing ledgers, purchase orders and itemized book titles.
  - **Book Fair Review:** Reviewing how cash generated on-campus from Scholastic Book Fairs is tracked, deposited, and spent.
  - **Internal Controls:** Reviewing financial structures to identify who holds final signature authority to authorize a book purchase package at the district level.
- **Primary Contacts:** District Business Administrators and accounting teams.
- **Staff Hours Required:**
  - **USBE Staff Hours:** 180 Hours
  - **LEA District Staff Hours:** 180 Hours Total  
(~12 hours total across each of the 15 sampled LEAs)

## Phase 2: Supply Chain & Procurement (7 Weeks)

- **Objective:** Conduct a comprehensive, technical review of procurement contracts, supply chain distribution logistics, and digital asset management systems (library databases/online collections).
- **Scope:** Sample of 12 districts and 3 charters to focus on the major national vendors and distribution channels utilized in Utah.
- **Key Focus Areas:**
  - **Contractual Terms & Financial Commitments:** Auditing Master Service Agreements and technical service contracts with major national distributors.
  - **Vendor Agreements:** Reviewing contracts with major distributors to check for automatic renewals or multi-year financial commitments.
  - **Distribution Center Technical Processing:** Investigating vendor-provided shelf-ready services—specifically, whether distributors perform pre-shipment processing (including automated cataloging, spine labeling, and electronic barcoding) that bypasses manual, on-site inspection protocols at the LEA level.
  - **Inventory Control & Safeguards:** Auditing the technical infrastructure of digital library reading apps and physical inventory software to evaluate content-filtering capabilities, digital curation oversight, and the operational viability of parental restriction and opt-out logs.

- **Legal Liability Clauses:** Reviewing vendor contract language for vendor accountability and legal liability for LEAs.
- **Primary Contacts:** LEA Procurement Directors, Purchasing Agents, and Legal Counsel
- **Staff Hours Required:**
  - **USBE Staff Hours:** 220 Hours
  - **LEA District Staff Hours:** 75 Hours Total  
(~5 hours total across each of the 15 sampled LEAs)

### Phase 3: Regulatory Compliance & Training (7 Weeks)

- **Objective:** Assess local board policies and conduct a statewide system review of library staff qualifications, purchasing standards, and professional development pathway and training.
- **Scope:** All 41 Districts and charters. Policy text is publicly available and a single digital survey can be scaled statewide.
- **Key Focus Areas:**
  - **Policy Alignment:** Cross-mapping all LEA policies against Board Rule R277-628 and §53G-10-103.
  - **The Challenge Process:** Reviewing the steps and timelines districts take when a book is formally challenged by a parent.
  - **Librarian Qualifications & Credentials:** Verifying school-level library staff data to determine the qualifications of school libraries staffed by certified Library Media Specialists, licensed educators, or classified media clerks.
  - **Systemic Training Pathways:** Reviewing the required onboarding and annual training provided by the district to frontline library staff regarding sensitive materials and collection maintenance.
  - **Collection Development Standards:** Identifying the specific criteria, professional review journals (e.g., *School Library Journal*, *Kirkus*), or rubrics used to evaluate a book's educational value before it is purchased.
  - **Professional Organization Influence:** Reviewing three years of training logs, state conference agendas, and policy templates to determine the role outside professional organizations play in shaping local district guidelines.
  - **Distributor Guidance:** Evaluating district collection development processes and reliance on selection lists, automated text-alignment data, or marketing materials provided directly by major book distributors when updating their catalogs.
  - **Parental Complaint Logs:** Collecting data from all supervisors on the exact number of formal book challenges filed over the last 3 years.
- **Primary Contacts:** The 41 District-level Library Media Supervisors and all charter school directors.
- **Staff Hours Required:**
  - **USBE Staff Hours:** 160 Hours
  - **LEA District Staff Hours:** 534 Hours Total  
(~3 hours across the entire statewide network of traditional district supervisors)

and charter administrators.)

## Phase 4: Synthesis, Evaluation, & Reporting (4 Weeks)

- **Objective:** Consolidate and analyze data from all preceding phases to produce a conclusive final report.
- **Scope:** Data analysis phase only. No new information is requested from districts.
- **Key Focus Areas:**
  - Analysis of Data
  - Final Report Drafting & Presentation
- **USBE Staff Hours:** 120 Hours

## Summary Table

Phase	~ Calendar Window	USBE Hours	District Office Hours
<b>Phase 1: Fiscal Analysis</b>	June 8 – August 3, 2026 (8 Weeks)	180 Hours	180 Hours (12 hours each)
<b>Phase 2: Supply Chain &amp; Procurement</b>	August 3 – September 21, 2026 (7 Weeks)	220 Hours	75 Hours (5 hours each)
<b>Phase 3: Regulatory Compliance &amp; Training</b>	September 21 – November 9, 2026 (7 Weeks)	160 Hours	534 Hours (3 hours each)
<b>Phase 4: Synthesis, Evaluation, &amp; Reporting</b>	November 9 – December 7, 2026 (4 Weeks)	120 Hours	0 Hours
<b>TOTALS</b>	<b>June to December 2026</b>	<b>680 Hours</b>	<b>789 Total LEA Hours</b>