A Self-Evaluation Model for School Libraries in Portugal

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Abstract

This chapter presents a project developed by the Portuguese School Libraries Network aimed at establishing a Self-Evaluation Model for School Libraries. The context from which the Self-Evaluation Model originated is described in-depth, with a particular focus on the different stages of implementation and the incorporation of feedback obtained from schools. Additionally, the chapter introduces some of the solutions found to tackle issues related to the scale and scope of the intervention: the Self-Evaluation Model was applied at national level, across several levels of education, and it entailed the use of e-learning for country-wide staff training purposes. The objectives of each phase of implementation are outlined and discussed with reference to resources, procedures and outcomes generated. The chapter closes with a reflection on the impact of the Self-Evaluation Model on future action and on its added value to international practice.

Keywords

Portugal; School Libraries Network; Rede de Bibliotecas Escolares (RBE); Self-Evaluation Model; Teacher librarian training; School library education.

Introduction

In 1996, the Portuguese Ministry of Education created the Portuguese School Libraries Network program (RBE/SLN), aimed at establishing and developing school libraries in primary and basic schools (ages 6-14; mandatory education) and in secondary schools (ages 15-17).The delivery of a quality school library media program is a priority for the School Libraries Network (SLN), which now faces a new operational stage after having developed a significant number of school libraries and reaching the majority of students in the country: 100%

of basic school students (ages 11-14) and 92% of secondary education students (ages 15-17) benefit from a school library operating in accordance with SLN's guidelines.

Portuguese school libraries, for both basic and secondary education, now have appropriate facilities with high quality resources and a growing number of skilled library staff. Staff training was one of the key issues faced by the SLN. The coordinator of the school library is a trained teacher who has received complementary instruction on school librarianship (at different levels: continuing education, postgraduate and master programs). Research has demonstrated that having a full-time teacher-librarian (TL)--with solid training in the field, a stable professional situation and a good amount of time spent working with students and teachers--is critical for the maintenance of the school library program, but that was not the situation in Portuguese Schools, where most teacher-librarians were only allocated between 8 to 14 hours per week to work in the school library. There was a discrepancy between the high-quality guidelines produced by SLN and the reality of everyday life in schools, and teacher-librarians could not do quality work in the time they had available (Bastos, 2006).

In the last four years, the circumstances have changed. The central administration acknowledged that the school library and a highly skilled teacher-librarian were pivotal for the implementation of several educational reforms and programs launched recently, including the National Reading Plan (2007) and the ICT Plan for Education (2008). Therefore, a number of schools began to benefit from a fulltime teacher librarian (100 TLs in 2007-2008 and 500 TLs in 2008-2009). Concurrently, SLN was aware that the sustainability of the program depended on ensuring ongoing investment and on informing stakeholders about how the school library contributes to success in education through improving teaching, learning and student performance. As a consequence, it became of utmost importance to gather objective information on how school libraries develop and operate and on how they contribute to effective student learning and to the goals of lifelong learning. The evaluation of school libraries appeared to be essential, and the creation of an evaluation model was a response to this need.

On July 2009 an official document was issued to clearly establish quality criteria in the selection of the teacher-librarian, thus ensuring an important sense of stability and continuity to the job. The position is now tenured for a minimum period of four years, whereas before the selection of the teacher-librarian was made on an annual basis. The former annual nomination scheme was a source of several other problems: although some recommendations existed (not mandatory), published by the SLN regarding the constitution of library staff, some schools did not fully consider these aspects and appointed their school library's coordinator based only on the administrative allocation of working hours. Naturally, all of these aspects influenced classroom teachers' perceptions of the teacher-librarian. Nevertheless, the Portuguese teacher-

librarians are, in general, excellent professionals, with good qualifications (both in curriculum subjects and in librarianship), and they conduct quality work with students and teachers. However, the role of the TL is a very demanding one, and he/she needs the institutional and personal conditions to uphold a strong position within the school's organization.

The job description of the TL is also part of the official document, and it clearly shows that the school library must be integrated into the pedagogical activities of the school, particularly concerning reading promotion, reading skills, information literacy and digital abilities as well cross-disciplinary competences, all integrated into the curriculum content. These connections between the school library and curriculum are considered a key issue, and it is expected that classroom teachers and the teacher who is responsible for the school library will work collaboratively to find the best ways to promote success. Moreover, the teacher-librarian's job description is aligned with the self-evaluation model since the domains under evaluation intersect with the items presented in the official document.

The Self-Evaluation Model (Bastos & Martins, 2009; Conde & Martins, 2010) is the result of previous study and analysis of existing models (in particular, the English model) and of, more specifically, the Portuguese schools' teaching and learning settings. The model combines four domains that represent essential areas for the accomplishment of school libraries' teaching and learning objectives. Some of the features are characteristic of the Portuguese reality, but they are all directed towards critical teaching and learning dimensions of school libraries: (1) Supporting Curriculum Development; (2) Promoting reading and literacy; (3) Projects, Partnerships, Open-ended and Community-oriented Activities; and (4) School Library Management. Key concepts such as value, impact and evidence-based practice have supported the way in which the Self-Evaluation Model was conceived (Cronin, 1982; McKenzie, 1989; Todd, 2008). Great emphasis was placed in determining how processes contribute to the achievement of a larger goal, which would be confirmed by the accomplishment of specific quality-embedded outcomes. Resources and processes are important only in the measure of their added value and contribution to developing teaching and learning.

This type of analysis is in itself a basic principle of good management and a pivotal instrument for project development, contributing greatly to the wider recognition and affirmation of the school library's role. It also allows a sharper understanding of how well the mission and objectives set for the school library are being accomplished, since it helps in the identification of good and poor practice and of required action. This self-evaluation model is an example of an action-research process, as it endeavors to establish a relationship between processes and the impact or value they generate. Typically, such a process involves: (1) identification of a problem; (2) evidence collection; (3) scrutiny, evaluation and interpretation of evidence; and (4) knowledge generation to guide future action (Markless & Steatfield, 2006).

These perspectives informed the conception and structure of the Self-Evaluation Model. Because the SLN intended national coverage for the model, the instrument had to be tailored so that it could be easily adopted across all school libraries in Portugal. The aim was to help school libraries with the evaluation process and to give schools and teacher librarians an instrument that could assist them with internal analysis, whilst pointing to key aspects that should be taken into consideration. Ultimately, SLN decided to produce a document to facilitate self-evaluation, using performance indicators. Additionally, descriptions and perspectives on the school library's operation and its connections within the school were also included (Bastos & Martins, 2009; Conde & Martins, 2010, SLN, 2010a).

The implementation of the Self-Evaluation Model was not without problems, as the following section describes. Our focus is on strategies and steps conducted by the steering group which we believe can be used as examples of good practice in similar implementation contexts.

Implementation of an Evaluation Model: Challenges and Strategies

As we have outlined, the School Libraries Self-Evaluation Model was created by SLN in response to the emergent need of developing an evaluation instrument that could effectively generate uncontested acknowledgement of school libraries' impact and value, whilst contributing to quality of service provision through action planning and continuous improvement cycles.

The application of the model in the field was preceded by a series of steps planned and executed by a specialized steering group, which culminated in the drafting of a final document that could respond to the characteristics and the needs of Portuguese school libraries. To ensure the sound development of the project, the steering group was committed to identify the difficulties and the positive aspects in the implementation of the Self-Evaluation Model through environmental scanning and to deploy timely training and advocacy to enlarge stakeholders' knowledge base, their understanding of the Self-Evaluation Model, and their acceptance of its implications.

Advocacy and Testing Phase

The implementation of the Self-Evaluation Model began with a pilot phase (years 2008 and 2009), which corresponded to the introduction of a first version of the Model. This phase was designed to specifically address schools of all levels which were allocated a full time teacher librarian. A total of 120 schools corresponded to this purposive selection criterion and therefore constituted the population for the intervention.

Experimentation with the Model's features was preceded by meetings with executive directors and teacher librarians in schools in all Regional Directorates of Education. The purpose of these meetings was to introduce stakeholders to the overarching principles sustaining the process of school libraries' self-evaluation and to the core concepts and affordances of the Model. The presence of schools' executive directors was particularly important in that it signalled the engagement of schools as a whole towards the improvement of school libraries and a commitment of management to getting the process of evaluation started.

However, the implementation of a model conceived to operate as an instrument for country-wide use across all levels of education (school libraries from basic education to upper secondary education, from 6 to 17 year old students) was not without problems. The greatest obstacles detected were: a lack of established practice in evaluation; a lack of skills in collecting, developing instruments, analyzing evidence and reporting performance; and difficulties in combating detected weaknesses through transformative action plans.

Another distinctive feature of the piloting phase was the selection of a specific domain of the school library's action to evaluate. The SLN recommended schools initiated the evaluation process by addressing Domain A - Supporting Curriculum Development, which includes subsections A.1: Articulating the School Library with the Curriculum, Pedagogic Structures and Teaching Staff, and A.2: Developing Information Literacy Skills. Domain A evaluates the level of curricular negotiation taking place between the school library, the school's pedagogical management board and the teachers in order to advance an integrated approach to literacies development. The decision to recommend the evaluation of this domain stemmed from the general perception that school libraries struggle to fully develop it and may face difficulties in assessing performance accordingly.

Despite the persistence of some problems, the feedback obtained was clearly positive, with stakeholders involved in evaluating this domain demonstrating advanced understanding of the Model as an instrument of advocacy, able to produce and disseminate evidence of the school libraries' pedagogical role. At the end of this two-year-long piloting phase, the steering group has made a revision of the initial version of the Model, based on feedback and evidence collected from stakeholders. These data informed the conceptualization of a finalised version, which was published in 2010.

Training Process

Across the period of time spanning 2008 to 2010, SLN has implemented an in-service training module about the Self-Evaluation Model for teacher librarians. The national coverage of the Model required the training of teacher

librarians from all over the country, and e-learning was the best way to reach a large number of TLs. This strategy has enabled teachers from different parts of the country to discuss and understand the Self-Evaluation Model, becoming more prepared to implement it in their own schools.

The training module was based on a "virtual classroom" (using an LMS such as Moodle and exploring all the technological and pedagogical affordances of the system) and on two face-to-face workshops which provided participants with the opportunity to build a "real" learning community. The module had a more theoretical component, based on the discussion of the main concepts implied in the Self-Evaluation Model--the ideas of quality and value, impact and evidence-based practice--and a practical dimension concerned with the application of the Model.

In 2008, 100 teacher librarians benefited from initial training and an international seminar on evaluation took place with invited specialists Ross Todd, Kathy Lemaire, David Stretfield and Nancy Everhart. In the academic year of 2009-2010, a total of 1080 participants, spread across 35 classes, benefited from training. The figure increased again by the end of 2010, with additional 240 trainees.

The training of teacher librarians is itself being subject to external evaluation conducted by Ana Maximino through a master's research project supervised by Lisbon Institute of Education's Angela Rodrigues. Questionnaires have already been administered and the preliminary data analysis indicates that a large majority (90%) of those inquired rating the training highly (ratings of 3 or 4, using a Likert scale where 3 and 4 indicate the highest levels of satisfaction) and considered that the provision of training contributed to a better understanding of the Model, to an adequate framing of professional practice, and to the acquisition and development of quality methods, techniques and instruments. We can therefore claim that the existence of a piloting phase, the incremental application of Model, and the simultaneous training opportunities offered by SLN have all contributed to a steadily understanding and acceptance of the Model's proposed value by schools and teacher librarians.

Support and Monitoring

The academic year 2010-2011 began a new cycle of evaluation. Evaluation cycles are designed to develop within a 4-year framework, to better respond to the 4-tiered organisation of the Model and to the recommendation that school libraries should restrict evaluation to a single domain each year.

Concurrently, other important supportive measures were taken. The support and monitoring of the application of the Model in school libraries is performed by SLN via email and a FAQ service and also with the help of more than 50 regional teacher librarian advisors. These advisors have been working

in close proximity with schools, feeding back implementation difficulties to School Libraries Network.

Furthermore, SLN responded with the creation of a web-based application designed to help schools understand the use of evidence collection tools (namely, the technical processing of data gathered); to assemble information concerning the number of schools undergoing the process; and to report and record results of their self-evaluation.

At the end of every academic year, school libraries submit a self-evaluation report which identifies strengths and weaknesses and which sets objectives and improvement targets for forthcoming years. After a cycle of 4 years has elapsed, all domains of action identified in the Model will have been evaluated, providing an overall vision of service provision quality. The foundations of a new cycle of evaluation are also launched, since a clearer awareness of areas requiring either continued supportive action or new strategic development has been solidly identified by evidence.

Assessment and Evaluation

The external accreditation of schools' internal evaluation--of which the School Libraries' Self Evaluation Model is a constituent part--is performed by the General Inspection of Education, with whom SLN has regular contacts. It is expected that a greater sensibility of inspection teams towards the role of the school library leads to its inclusion in the appraisal of school's global performance.

In fact, the association of the Model with the wider process of school's evaluation and its further integration within the framework of the General Inspection's external evaluation reports is crucial in building momentum and in providing school libraries with increased visibility across schools, especially across sectors not traditionally familiar with its value. We are in the position to claim that this process is evolving in a positive way, with an increasing number of General Inspection's reports devoting specific sections to the school library and to its performance results.

Moreover, it is important to state that beyond a strong commitment to setting quality standards against which performance can be checked and assessed, the Model operates as a normative instrument with great pedagogical potential, as outlined by SLN's external evaluation report: the Model aims "to give schools an instrument that guides self-appraisal of performance, whilst pedagogically setting quality standards through systematic provision of up-to-date guidelines of excellent performance" (2010b, p. 39). Consequently, the Model has become a pivotal instrument for informed decision-making, collecting intelligence that helps the School Libraries Network's executive board evaluate the benefits of investment and plan the sustainable development of the program.

On the basis of the findings above, we can appreciate how the implementation strategy generated positive outcomes at three different levels:

(1) The first level relates to the model's implementation process itself. The option for a piloting phase with consultations with participants (teacher librarians) has contributed to a larger involvement with tasks and work stages, as well as to a greater commitment to the project's success.

(2) The second level concerns impact achieved in terms of raising the school library's profile within the school context. With the introduction of the Self-Evaluation Model, the visibility of the school library increased. Concurrently, the institutionalization of the TL position in 2009 has underlined the responsibility inherent to the post. In a recent master's thesis supervised at the Open University by Gloria Bastos, the issue of leadership was the focus of inquiry, with the most frequent ideas related to the introduction of the Self-Evaluation Model being 'improvement,' 'change,' and 'opportunity.'

(3) A third level is related to the role of the Self-Evaluation Model as a framework for action and a source of quality standards that are readily available to the TL, informing the planning and execution of activities in the school context.

Lessons Learned and Future Development

Throughout the process of implementation, several structural and organizational factors of the Portuguese educational environment have been acting as catalysts and facilitators, contributing decisively to acceptance of the Model and to positive outcomes:

I.   The fact that the Portuguese education system is still heavily centralized, with the Ministry of Education controlling to a great extent the development of projects and policies, facilitated school's recognition of the Model and its benefits. Concurrently, it triggered the involvement of stakeholders, which led to a smooth application;

II. A pervasive culture of evaluation contributed to the wide acceptance of the Model, and its inception coincided with an unprecedented turn to evaluation policy and practice across the public sector. The most significant factors were the concurrent development of a new teacher evaluation model and a school results-based funding scheme.

III. The introduction of new legislation, officially recognizing and accrediting the position of teacher librarian;

IV. The existence of regional teacher librarian advisors who act in the field and assist libraries with the implementation of the Model.

Nonetheless, the application of the Model has also faced a number of constraints. These difficulties were mostly related to the fact this new tool re-

quired the internalization of concepts and practices not entirely familiar to all stakeholders:

I.   The Model is centered on the concept of evidence-based practice. However, there was a recognized lack of knowledge or record of practice of such concepts;

II. The Model requires competences in managing and interpreting evidence, and teacher librarians were not proficient in the execution of those skills;

III. Schools and teacher librarians required specialized assistance to monitor the development of their work.

The strategies that were followed, namely the option for a piloting phase emphasizing consultation with stakeholders and the intensive training of a great number of TL, contributed to a greater engagement of all parties and a commitment to a successful implementation of the evaluation model.

As mentioned above, the development of a staff training plan, using e-learning, was a critical factor in the successful implementation of the model. However, new issues are being identified and lines of action are currently under preparation to strengthen the quality of content and policy guidelines available and to disseminate best practice through the development of communities of practice. A reflection about the structure and complexity of the Model and about the number of indicators under evaluation is also required at the end of the first cycle of evaluation (2010/11-2013/14).

Overall, and considering its impact in practice, the main outputs of the School Libraries Self-Evaluation Model are:

*   a growth in number and quality of skilled staff, more knowledgeable in the process of evaluation and continuous improvement cycles;

*   school librarians being forced to think out of the box, working collaboratively and creating multi-level relationships within the school and very importantly with management boards;

*   the establishment of a series of core principles related to proactively seeking good practice and the alignment of the library's services with the curriculum;

*   the embedding of results in the wider school evaluation process capitalizes the management board's attention. It can moreover operate as an advocacy tool, providing evidence of the school library's value and practice; and

*   a greater recognition of the school libraries' value emerges as a consequence of different agents' validation of practice and processes, namely the General Inspection's.

The Model was designed to raise the profile of school libraries and strengthen their contribution towards educational objectives. Several studies have outlined the impact of resources and the way they are applied in teaching and

learning situations to enhance educational success. Gamoran, Secada, and Marrett (2000), in particular, stress that "resources matter for learning when teachers apply resources in their classroom teaching" (p. 46). It is therefore fundamental to underline that the value of a school library goes well beyond the physical availability of equipment and resources. The real value and impact in students' learning derives to a great extend from what teachers do with them and from how they align their use with outcomes, hence the need to develop performance assessment instruments, to promote evaluation processes, and to encourage reflection about evaluation.

Sustainable development of school libraries in Portugal will require a continuous stream of tangible evidence of benefits, a mature provision of tools and the availability of advice and support in close proximity to schools. Moreover, it will require policy that ensures no break in continuity of employment for full-time teacher librarians.

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