

School Library Materials Acquisition and Procurement Review

Draft 1: Board Member Green – Draft 1

Date: August 4, 2026



Utah State Board of Education

School Library Materials Acquisition and Procurement Review

Draft Survey Instrument and Supporting Materials

DRAFT — For Board discussion and staff refinement. Not an adopted USBE document.

Contact Person and Email: Member Emily Green, emily.green@schools.utah.gov

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1. Purpose and Background

Utah has adopted, implemented, and twice revised a statutory framework governing sensitive instructional materials in public schools (Utah Code § 53G-10-103, implemented through Board Rule R277-628, with a statewide-removal mechanism added by H.B. 29 in 2024). The Board maintains and updates the statewide list of titles removed under that framework. To date, however, most of the state's attention has been directed at what happens after a book is already on a shelf — challenges, reviews, appeals, and removals. This review examines the other end of the pipeline: how materials are funded, marketed, recommended, procured, processed, and selected before they ever reach a student.

The Legislative Auditor General reached a compatible conclusion in 2025. The June audit found that LEA challenge processes generally work as designed when a book is contested, but that the system relies on individuals discovering and challenging titles; the October book review reiterated that proactive, front-end selection standards would reduce recurring cycles of challenges, and recommended the Legislature consider whether LEAs should be required to adopt selection policies. The auditors also identified gaps in classroom-library policies and inconsistencies in digital filtering, including on Utah's Online School Library. This Board review supplies the acquisition-side evidence base those recommendations call for.

Scope. The instrument collects three fiscal years of data (FY2023-24 through FY2025-26) from the sampled 12 school districts and 3 charter LEAs, across four respondent roles, in alignment with the four phases of the approved timeline. An optional companion questionnaire (Section E) gathers the vendor-side view from major distributors and platforms, allowing LEA answers to be cross-checked against supplier data. The review is a study of systems, funds, contracts, and processes; it does not evaluate individual titles, staff members, or viewpoints.

Outcomes. If current systems are working well, the data will demonstrate that and reinforce confidence in local practice. If there are structural gaps — purchases that bypass review, funds that are not tracked, selection driven by pre-assembled lists no one locally examined, or one-sided market access — the Board will have the specific, documented evidence needed to recommend improvements. Either outcome fulfills the Board's oversight responsibility.

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2. Design Principles

Ask about systems and records, not opinions. Every question concerns funds, contracts, processes, lists, training, and documents. No question asks any respondent about beliefs, affiliations of conscience, or the viewpoints of any book, author, or organization.

Ask it of everyone alike. Questions about memberships, funding, marketing, curated lists, and market access are posed identically for every organization and supplier category — national associations and their affiliates, mainstream wholesalers, and specialty or classical-education-oriented suppliers. Symmetry is what makes the resulting data credible.

Pair every claim with a record. Respondents are asked to attach the underlying artifact — the purchase-order register, the contract, the opening-day manifest, the training log, the compliance verification — so that the final report can cite documents rather than self-description. Where an estimate is unavoidable, the respondent states its basis.

Respect the budgeted burden. Sections are routed to the role that already holds the records, and are sized to fit the LEA staff-hour budgets in the approved timeline (approximately 12 hours per LEA in Phase 1, 5 in Phase 2, and 3 in Phase 3). Attachments of existing documents, rather than narrative writing, carry most of the load.

Stay on Utah's legal ground. The instrument is anchored in the content standards of Utah Code § 53G-10-103 and Rule R277-628 and in ordinary procurement, fiscal, and records law. It deliberately avoids inquiry into ideas or viewpoints, consistent with Board of Education v. Pico's limits on viewpoint-based action — a discipline that is especially prudent while a federal challenge to H.B. 29 is pending. A review built on neutral, verifiable questions produces findings that survive scrutiny.

Treat responses as public records. Survey responses and attachments are government records subject to GRAMA. Respondents are informed of this in the instructions, and no question requests privileged legal content or student-level data.

3. How the Instrument Maps to the Approved Timeline

Survey section	Timeline phase	Primary respondent	Est. burden
A. Funding and Fiscal Controls	Phase 1 (Fiscal Analysis)	Business Administrator / accounting	6–8 hrs

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Survey section	Timeline phase	Primary respondent	Est. burden
B. Procurement, Contracts, and Supply Chain	Phase 2 (Supply Chain & Procurement)	Procurement Director, with Legal Counsel	4–5 hrs
C. Selection, Collection Development, and Staffing	Phase 3 (Regulatory Compliance & Training)	District Library Media Supervisor / charter director	3–4 hrs
D. External Relationships and Certification	Phase 3	Superintendent / Executive Director or designee	About 1 hr
E. Vendor and Platform Questionnaire (optional)	Phases 2–3	USB E staff, to vendors	n/a (USB E)
F–H. Document request, research items, administration	All phases	USB E staff	n/a (USB E)

Phase 4 (Synthesis, Evaluation, and Reporting; November 9 – December 7, 2026) consumes the outputs of Sections A–E; no new LEA data is requested in that phase.

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4. Instructions to Responding LEAs

- Reporting period: the three most recent completed fiscal years — FY2023-24, FY2024-25, and FY2025-26 — unless a question states otherwise.
- Routing: the superintendent or executive director designates a coordinator; Sections A–D are completed by the roles indicated and returned together.
- Attachments: where a question says "attach," provide the existing document; do not create new narrative documents. Label attachments with the question number.
- Completeness: "None" and "Not tracked" are acceptable answers and are themselves findings; if information is not tracked, say so rather than estimating. Where an estimate is expressly permitted, state its basis (system report, sample, or professional judgment).
- Public records: responses and attachments are government records subject to the Government Records Access and Management Act. Do not include privileged legal content or personally identifiable student data.
- Due date: [DATE — four weeks from distribution]. Questions: [USB E STAFF CONTACT, EMAIL, PHONE].

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5. Definitions Used in This Instrument

LEA — A local education agency: a school district or a charter school/network.

Library materials — Books and other materials made available through a school library in any format — print, e-book, audiobook, or database.

Approval plan — An arrangement in which a vendor automatically recommends or ships new titles matching a profile (grade level, subjects, categories, awards) configured for the customer.

Standing order — An order to automatically receive future titles in a series, award list, or category without a separate per-title decision (for example, monthly selection-club shipments).

Opening-day (starter) collection — A large, vendor-assembled collection — often thousands of titles — purchased to stock a new or renovated library.

Shelf-ready / technical processing — Vendor services (catalog records, barcodes, spine labels, covering) that deliver items ready to place on shelves.

Curated / selection list — Any pre-assembled list of recommended titles — vendor, publisher, association, award, or state list — used in choosing purchases.

Collection development policy — The LEA's written policy governing selection, gifts, weeding, and reconsideration of library materials.

Weeding / deselection — Removal of items from a collection for condition, currency, use, or policy reasons.

Cooperative contract / consortium — A contract established by the state, a purchasing cooperative, or a group of entities from which member LEAs may buy.

Master service agreement (MSA) — An umbrella contract governing terms across multiple purchases from one vendor.

Digital content platform — A licensed service delivering e-books, audiobooks, or databases, whether district-licensed or statewide (for example, Utah's Online School Library).

Content metadata / descriptors — Data attached to a title — age or grade level, subjects, content notes, ratings — usable for filtering or blocking.

Professional organization — A membership association serving library or education professionals, including its divisions, affiliates, round tables, and state chapters.

Book fair — An on-campus retail book-sales event operated with a vendor, typically generating cash proceeds or vendor credit for the school.

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Statewide removal list — The list of titles USBE directs all Utah public schools to remove from student access under Utah Code § 53G-10-103.

Section A — Funding and Fiscal Controls

Respondent: District/Charter Business Administrator and accounting staff. Supports Phase 1 (Fiscal Analysis).

A-1. Complete Table A-1: total expenditures on library materials in each fiscal year, by funding source. If your accounting system cannot isolate library materials, identify the account codes used and provide your best estimate with its basis.

Funding source	FY2023-24	FY2024-25	FY2025-26
State and local general funds (incl. WPU-derived)			
School LAND Trust funds			
Federal — ESSA Title I			
Federal — ESSA Title IV-A			
Federal — other (identify)			
Utah State Library / LSTA-funded grants (e.g., book-enhancement grants)			
Other state grants (identify)			
Private grants and foundations (identify)			
PTA / booster / donations			
Book fair proceeds or vendor credit			
Other (identify)			
TOTAL			

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- A-2.** Which object/function codes in your chart of accounts capture library material purchases, and do those codes distinguish library materials from classroom or curriculum materials? Attach the relevant chart-of-accounts extract.
- A-3.** Describe the purchase workflow for library materials from requisition to payment, including any dollar thresholds that change the approval path.
- A-4.** Who holds final signature authority to approve (a) a routine library book order, (b) a bulk or opening-day collection purchase, and (c) a digital content license? Identify by title or role.
- A-5.** Are purchasing cards, Amazon Business or similar marketplace accounts, or blanket purchase orders used for library materials? If so, what controls apply and who reconciles them?

Book fairs and on-campus sales

- A-6.** List every book fair or on-campus book-sales program operated in the reporting period (vendor, participating schools, frequency).
- A-7.** For each fair, report gross sales, the share retained by the school, and whether proceeds were taken as cash or as vendor credit ("dollars").
- A-8.** Into which fund or account are book fair proceeds deposited, who authorizes their expenditure, and are items acquired with vendor credit subject to the same selection review as purchased library materials?
- A-9.** Describe cash-handling and deposit controls for book fair revenue (counting, dual custody, deposit timing), and attach the most recent school-level book fair financial report.

Gifts, dues, travel, incentives, and grants

- A-10.** Does the LEA have a written policy for accepting donated or gifted books? Attach it, and describe how donated items are reviewed before being made available to students.
- A-11.** Complete Table A-2: professional-organization memberships paid or reimbursed with public funds during the reporting period.

Organization	Individual or institutional	No. of staff covered	Annual cost	Funding source

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Organization	Individual or institutional	No. of staff covered	Annual cost	Funding source

A-12. Complete Table A-3: conferences and professional events related to library services attended at LEA expense during the reporting period.

Event and sponsoring organization	Year	Attendees	Total cost (incl. travel)	Funding source

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A-13. Did any staff receive third-party support to attend such events — scholarships, stipends, sponsored travel, honoraria, or reimbursements from vendors, publishers, or associations? List each instance and its value.

A-14. List discounts, rebates, rewards or points programs, free processing, donated collections, or other incentives received from library-material vendors in the reporting period, with estimated value and where each is recorded.

A-15. List all grants related to library materials applied for or received in the reporting period (grantor, program, amount, terms). Attach award letters, including for any Utah State Library / LSTA-funded awards.

A-16. Attachments for Section A: general-ledger extract for library-material accounts (3 years); purchase-order register for library materials (3 years); chart-of-accounts extract; most recent book fair financial report; gift/donation policy; grant award letters; dues and travel records.

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Section B — Procurement, Contracts, and Supply Chain

Respondent: Procurement Director / Purchasing Agent, with Legal Counsel as needed. Supports Phase 2 (Supply Chain & Procurement).

B-1. Complete Table B-1 for every vendor from which library materials (print or digital) were acquired in the reporting period.

Vendor	Material types	Contract vehicle (bid/RFP; state cooperative + no.; other co-op; sole source; small purchase; marketplace)	Auto-renew (Y/N)	FY24 spend	FY25 spend	FY26 spend

B-2. Attach the current contract or master service agreement for each of your library-material vendors.

B-3. For each attached contract, identify: term and renewal provisions; termination rights; return rights for unsuitable items; indemnification or liability provisions relating to content; and any provision referencing Utah's sensitive-materials standards (Utah Code § 53G-10-103) or the USBE statewide removal list.

B-4. Does any contract, purchase-order term, or vendor-onboarding step require the vendor to acknowledge Utah's sensitive-materials standards or to exclude titles on the statewide removal list? If yes, attach the language; if no, state whether such a term has been considered.

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- B-5.** Describe how library-material vendors are approved. Is there an approved-vendor list, and what vetting applies? May schools purchase from any responsible vendor meeting standard terms, or are purchases restricted to designated vendors? Identify any vendor exclusions and the basis for each.
- B-6.** What barriers, if any, limit purchasing from smaller or specialty publishers and suppliers (for example, processing compatibility, MARC record availability, minimum orders, cooperative-contract scope, or pricing)?
- B-7.** If the LEA purchased from Baker & Taylor before its closure (operations ceased by January 2026), describe the transition: replacement vendors, disposition of any contract, and any service disruption or emergency purchases.

Automatic and pre-assembled purchasing

- B-8.** Does the LEA participate in any approval plan, standing order, subscription box, or automatic-shipment program for library materials? For each: vendor; profile criteria; who set the profile and who may modify it; shipment frequency; and return or opt-out rights.
- B-9.** For automatic or profile-based shipments, what share of received items is individually reviewed by LEA staff before being made available to students? Describe the review step.
- B-10.** List every opening-day or starter collection purchased in the last five years (school; vendor; approximate title count; cost). For the most recent: who assembled the list; what selection criteria, filters, or category targets the vendor applied; the extent of local line-item review before ordering; and attach the vendor manifest, including any subject or category breakdown.
- B-11.** Which shelf-ready or technical-processing services do vendors provide (catalog records, MARC, barcodes, labels, covering)? Does any pathway allow an item to reach student access without review by LEA staff? Describe receiving and inspection steps.
- B-12.** Which ordering platforms are used (for example, vendor storefronts or Titlewave-style systems)? Which vendor-generated recommendation, award, theme, or "hand-picked" lists are available within them, and which are used?
- B-13.** Can your ordering platforms filter or block titles by: the USBE statewide removal list; age or grade metadata; content descriptors or ratings; or Utah-specific profiles? State which filters are enabled today.

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- B-14.** Estimate the percentage of last fiscal year's library-material orders (by title count) that originated from vendor-supplied lists or recommendations versus staff-initiated selections. State the basis for the estimate (system report, sample, or professional judgment).

Digital platforms and statewide-list implementation

- B-15.** List all digital content platforms available to students (district-licensed and statewide, including participation in Utah's Online School Library). For each: who curates the collection; what content-filtering or keyword controls are configured; and who administers them.
- B-16.** Describe parental visibility and control for digital platforms: can parents view holdings and checkout activity; are restriction or opt-out mechanisms available; and are opt-out logs maintained and operational?
- B-17.** Describe the process for implementing the USBE statewide removal list across print and digital collections, including e-book and audiobook platforms. Attach your most recent compliance verification for both.
- B-18.** Do catalog or platform views differ by role (student, parent, staff, public)? If so, describe the differences and their rationale.
- B-19.** List the vendor marketing channels received or attended in the reporting period: sales-representative visits; sample boxes or advance copies; sponsored meals, events, or professional development; exhibit halls attended; and vendor or organization mailing lists received at LEA-managed addresses.
- B-20.** Following any removal of purchased materials under Utah law, has the LEA sought or received any remedy from a vendor (credit, return, indemnity)? Describe outcomes.
- B-21.** Attachments for Section B: vendor spend report; top-five contracts or MSAs; cooperative-contract citations; approval-plan profiles; opening-day manifest(s); statewide-list compliance verifications (print and digital); platform filter-configuration summary.

Section C — Selection, Collection Development, and Staffing

Respondent: District Library Media Supervisor or charter school director. Supports Phase 3 (Regulatory Compliance & Training).

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Policy and selection sources

C-1. Attach the LEA's current library selection / collection-development policy and reconsideration policy. State adoption and last-revision dates and the approving body.

C-2. List verbatim every external document, standard, model policy, or organization statement cited or incorporated by reference in those policies (for example, association statements, model templates, review journals, or rubrics). If a policy was adapted from a template, identify the source.

C-3. Complete Table C-1: for each review or selection source, mark one column.

Review / selection source	Used regularly	Used occasionally	Not used
School Library Journal			
Booklist (an American Library Association publication)			
Kirkus Reviews			
The Horn Book			
Publishers Weekly			
Common Sense Media			
Content-rating rubrics or sites (identify, e.g., RatedBooks.org)			
Vendor or publisher descriptions and catalogs			
National award lists (identify which)			
State lists (e.g., Beehive Book Awards)			
Battle of the Books / reading-program lists (identify supplier)			
Peer librarian recommendations			
Student or parent requests			
Social media (identify)			
Other (identify)			

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- C-4.** Which of the sources marked above are treated as authoritative for age and content suitability, and why?
- C-5.** Before purchase, what documented check (if any) is performed against Utah Code § 53G-10-103 standards and the USBE statewide removal list? Identify who performs it and where it is recorded.
- C-6.** Is any written attestation required — from staff or from vendors — that ordered titles do not contain sensitive material as defined in Utah Code? If yes, attach the form. If no, state whether one has been considered and the rationale for exclusion.
- C-7.** For the 20 most recent library-material orders (or the most recent 90 days, whichever is larger), attach the selection documentation that existed before purchase (lists used, reviews consulted, approvals).
- C-8.** Who holds final selection authority at each building, and what district-level review, if any, applies before orders are placed?
- C-9.** Does the LEA use a library advisory or selection committee? Describe its composition, how members are chosen, and its role in acquisitions (as distinct from reconsiderations).
- C-10.** How are parents and community members able to provide input into selection policy and practice, apart from filing challenges?

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Staffing, training, and professional engagement

C-11. Complete Table C-2: library staffing by school level.

School level	Educators with library-media endorsement	Licensed educators without endorsement	Classified aides / clerks	Current vacancies
Elementary				
Middle / Jr. High				
High School				
Charter (all levels)				

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C-12. Complete Table C-3: every library-related training or professional-development activity completed by library staff in the reporting period. Attach agendas or logs, and identify which organizations supplied training content.

Provider	Topic	Hours	Cost	Funding source

C-13. What onboarding and annual training addresses Utah Code § 53G-10-103, Rule R277-628, and the LEA's selection policy? Attach materials.

C-14. List professional-organization memberships held institutionally or reimbursed for library staff (organization; level; cost; fund source), and any staff serving as officers, board, or committee members of library-related organizations, noting whether that service occurs on paid time.

C-15. List the organization newsletters, listservs, and mailing lists received by the district library office or by school libraries at LEA-managed addresses.

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Market familiarity and collection breadth

C-16. Complete Table C-4: for each supplier or program, mark one column. The list spans mainstream wholesalers, digital platforms, and specialty or classical-education-oriented suppliers; it is illustrative, not an endorsement of any entry.

Supplier / program	Purchased from (3 yrs)	Evaluated, not purchased	Not familiar
Follett Content Solutions (Titlewave)			
Mackin			
Ingram			
Brodart			
Perma-Bound			

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Supplier / program	Purchased from (3 yrs)	Evaluated, not purchased	Not familiar
Bound to Stay Bound			
Baker & Taylor (pre-closure)			
Junior Library Guild (standing orders)			
Scholastic (book fairs / clubs)			
Amazon or other marketplaces			
OverDrive / Sora (digital)			
MackinVIA (digital)			
Epic (digital)			
Utah's Online School Library			
Brave Books			
SkyTree Book Fairs			
The Good and the Beautiful			
Memoria Press			
Canon Press			
Classical Academic Press			
Other specialty or classical-education suppliers (identify)			

- C-17.** For any supplier marked "Not familiar" or "Evaluated, not purchased," briefly note the reason where known (never marketed to us; processing or MARC limitations; pricing; content fit; policy restriction; other).
- C-18.** Does the selection policy set expectations for subject coverage (for example, U.S. founding documents and civics, state and U.S. history, biographies, classics, STEM)? Attach any collection-mapping or curriculum-alignment standards used.
- C-19.** If your catalog can produce holdings counts by subject classification, attach counts for one representative secondary school in these areas: U.S. history; government and civics; biography; literary classics (state how defined); and total holdings. If not feasible, state why.

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Weeding, challenges, classroom libraries, and records

- C-20.** Attach your weeding/deselection policy. Report items weeded per year in the reporting period and the primary criteria, and describe the disposition of (a) weeded items and (b) items removed under Utah Code § 53G-10-103, including handling of statewide-removed titles.
- C-21.** Report the number of formal reconsideration requests received in each of the last three years; outcomes (retained; restricted; relocated; removed — objective; removed — subjective); and the median days from filing to final decision.
- C-22.** Describe student access to a challenged title while review is pending, citing the policy provision that governs interim access.
- C-23.** Identify the LEA's designated individual who reports sensitive-material determinations to USBE, and attach the log of reports submitted during the reporting period.
- C-24.** Does the LEA have a written policy governing classroom libraries? If yes, attach it. If no, describe current practice for how classroom collections are acquired, reviewed, inventoried, and held to selection standards, including teacher-purchased and donated items.
- C-25.** Are selection-related communications required to occur on LEA systems consistent with records-retention policy? Cite the policy and describe the training staff receive on public-records obligations.

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Section D — External Relationships and Certification

Respondent: Superintendent / Executive Director or designee. Supports Phase 3.

- D-1.** List every memorandum of understanding, partnership, sponsorship, or agreement between the LEA (or its schools) and any library-related organization, association, foundation, or vendor beyond routine purchase orders. Attach each.
- D-2.** List everything of value received from library-related organizations or vendors in the reporting period other than purchased goods — grants, donated books or collections, stipends, travel support, awards, or services — with estimated values.
- D-3.** Report total payments to library-related organizations in the reporting period, by category: memberships and dues; event registrations; sponsorships; licensing; other.
- D-4.** Identify any LEA policies relating to library materials that were adapted from model documents supplied by an outside organization, and identify the organization.

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- D-5.** In the reporting period, has the LEA received legal claims, demand letters, or litigation relating to library materials? Provide subject matter and status only; do not include privileged content.
- D-6.** Does the LEA maintain a log of external communications urging retention or removal of specific titles? If yes, report counts by year (the content of communications is not requested).
- D-7.** Certification: name, title, and signature of the official certifying the completeness and accuracy of the LEA's responses, and the date.

Section E — Vendor and Platform Questionnaire (Optional; administered by USBE)

If approved by the committee, USBE staff would send these questions to the major distributors, publishers' school channels, and digital platforms identified in Section B responses. Vendor answers allow LEA self-reports to be cross-checked against supplier-side data.

- V-1.** Describe how your recommended or curated lists for K-12 customers are generated — editorial staff, algorithms, external organizations, or a combination — and identify any external sources used.
- V-2.** What review sources and criteria inform the age or grade designations on your lists and product records?
- V-3.** What content metadata do you supply (age/grade level, subjects, content notes, ratings), and in which systems (storefront, MARC records)?
- V-4.** Can Utah customers filter or block titles by the USBE statewide removal list, by Utah's statutory content standards, by age or grade, or by content descriptors? Which of these are available today, and which could be configured?
- V-5.** Do you track titles removed under state sensitive-materials statutes in Utah or other states? Is that data available to customers?
- V-6.** Can you support Utah-specific purchasing profiles reflecting Utah Code § 53G-10-103? Describe how.
- V-7.** For your Utah K-12 accounts in the last fiscal year, what share of ordered titles originated from your curated lists or automated recommendations versus customer-initiated selections? If exact data is unavailable, provide your best estimate and its basis.

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- V-8.** Describe your return or credit policy when a delivered title is later determined to violate a customer's statutory standards.
- V-9.** What standard contract terms address content-related liability or indemnification for K-12 customers?
- V-10.** What marketing channels do you operate toward Utah school customers — mailing lists, sales representatives, sample programs, sponsored events, conference exhibits?
- V-11.** Do you sponsor, exhibit with, advertise with, or contribute to professional organizations or conferences serving school librarians? Identify categories and approximate annual amounts.
- V-12.** What onboarding or configuration assistance do you offer new Utah customers to align default settings with Utah law?

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Section F — Consolidated Document Request

The following records are requested as attachments to the survey. Existing documents only; no new documents need be created.

Item	Section	Phase
General-ledger extract, library-material accounts (3 years)	A	1
Purchase-order register for library materials (3 years)	A	1
Chart-of-accounts extract	A	1
Most recent book fair financial report	A	1
Gift / donation acceptance policy	A	1
Grant award letters (incl. Utah State Library / LSTA)	A	1
Dues and conference-travel records	A	1
Vendor spend report and top-five contracts / MSAs	B	2
Cooperative-contract citations	B	2
Approval-plan / standing-order profiles	B	2
Opening-day collection manifest(s) with category breakdown	B	2
Statewide-list compliance verifications (print and digital)	B	2
Platform filter-configuration summary	B	2
Selection / collection-development and reconsideration policies	C	3
List of external documents cited in policies	C	3
Pre-purchase selection documentation (20 most recent orders)	C	3
Training logs and agendas (3 years)	C	3
Challenge / reconsideration log and USBE reporting log	C	3
Weeding policy and annual weeding counts	C	3
Classroom-library policy (if any)	C	3
MOUs and agreements with external organizations	D	3

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School Library Materials Acquisition and Procurement Review

Draft 1: Board Member Green – Draft 1

Date: August 4, 2026



Section G — Board-Level Research Items (USBE staff; not part of the LEA survey)

Several of the review's questions are better answered from primary public documents than by surveying LEAs. Staff are asked to compile the following alongside the survey:

- G-1.** Obtain the public IRS Form 990 filings and annual reports of the national and state library organizations identified through the review, and tabulate each organization's revenue by source — membership dues, conference and exhibitor fees, publishing, and contributions and grants (noting any government-grant lines) — as well as grants the organization makes to others.
- G-2.** Request from the Utah State Library Division: the current LSTA Five-Year Plan; a list of subgrants made to school libraries (including any children's and teen book-enhancement grants); and the current status of federal IMLS funding.
- G-3.** Document the governance of Utah's Online School Library: contracting entity, platform vendor, statewide curation rules, filter configuration, and the controls available to individual LEAs.
- G-4.** Compile a verified reference list of organizations relevant to Utah school-library acquisitions — national associations and their divisions and state affiliates; independent advocacy entities; state organizations; review publications; and specialty or classical-education-oriented organizations and suppliers — each with a neutral description, corporate form, and relationships (parent, division, affiliate, or independent).
- G-5.** Obtain exhibitor and sponsorship prospectuses for the major conferences Utah school-library staff attend, to document the financial relationships between vendors and professional organizations.
- G-6.** Cross-check LEA survey answers against Section E vendor responses and, where warranted, targeted records requests.
- G-7.** Review USBE's own guidance and model documents for any external materials incorporated by reference, applying question C-2 to the agency itself.
- G-8.** Before publication, confirm the current status of market entities named in the report (closures, acquisitions, and program name changes occurred as recently as January 2026).

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Appendix — Orientation: Legal, Funding, and Market Context

Legal framework

Utah Code § 53G-10-103 (most recently amended effective May 7, 2025) prohibits sensitive instructional materials in the school setting and defines objective sensitive material by reference to the non-discretionary standards in Title 76. Board Rule R277-628 implements the statute, and H.B. 29 (2024) added the statewide-removal mechanism: when three school districts, or two districts and five charter schools, determine a title contains objective sensitive material, USBE directs its removal from all Utah public schools. USBE maintains the statewide removal list (updated July 6, 2026; approximately three dozen titles). In January 2026 the ACLU of Utah filed a federal complaint challenging H.B. 29 on First Amendment grounds; the litigation is pending. The pendency of that case is a further reason this review's questions are confined to funds, contracts, processes, and content standards rather than ideas or viewpoints.

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Legislative Auditor General findings (2025)

The June 2025 performance audit (Report 2025-11) reviewed 15 districts and 2 charters and found LEA challenge processes generally compliant once a title is contested, while identifying weak front-end selection standards, missing classroom-library policies, and inconsistent keyword filtering, including on Utah's Online School Library. The October 2025 follow-up reviewed 22 books drawn from school collections and reiterated the recommendation for stronger front-end selection processes, including whether LEAs should be required to adopt selection policies. This review operationalizes those recommendations on the acquisition side.

Funding pathways

School library materials are purchased with a mix of state and local general funds, School LAND Trust allocations, federal ESSA funds (Title I and Title IV-A), grants, donations, and book-fair proceeds or vendor credit. A separate federal stream flows from the Institute of Museum and Library Services through the Library Services and Technology Act to the Utah State Library Division (approximately \$2.3 million in current federal LSTA funding), which re-grants funds — including book-enhancement grants that can reach school libraries. IMLS itself was the subject of a 2025 dismantling order, subsequent litigation, and an April 2026 settlement restoring its grants; its

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Utah State Board of Education

funding beyond FY2026 remains unresolved in Congress. Section A of the survey captures the LEA side of these flows; item G-2 captures the state-level side.

Market structure

Most school-library purchasing runs through a small number of national wholesalers and platforms offering curated lists, approval plans, standing orders, opening-day collections, and shelf-ready processing — services that shape which titles are seen and how much local review occurs. The market shifted materially during this review's window: Baker & Taylor, long the largest library wholesaler with roughly 4,000 school, college, and library accounts, ceased operations by January 2026, pushing customers toward remaining channels such as Follett, Mackin, Ingram, and Brodart. Digital access runs through district-licensed platforms and Utah's Online School Library. Sections B and C document which channels each LEA uses, what curation and filtering they apply, and what share of purchasing originates from pre-assembled lists.

Professional organizations

National and state professional organizations publish reviews and award lists, operate conferences with vendor exhibitors and sponsors, provide training and model policies, and maintain divisions and state affiliates. The American Library Association, a Chicago-based 501(c)(3) with divisions including the American Association of School Librarians, discloses its finances in public IRS Form 990 filings and annual reports; its revenue mix includes membership dues, conferences and exhibits, publishing (including the review journal Booklist), and contributions and grants. Separate legal entities also operate in this space, including independent 501(c)(4) advocacy organizations. Utah-level organizations include the Utah Library Association, the Utah Educational Library Media Association, and the Children's Literature Association of Utah (Beehive Book Awards). Rather than asking LEAs to characterize any organization, the survey documents the concrete relationships — dues, travel, training, lists, model policies, mailing lists — and item G-1 assigns the funding question to primary public documents.

— End of draft —

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