

THE CALIFORNIA STATE UNIVERSITY

*Working Together*

# A Strategic Plan for the CSU Libraries

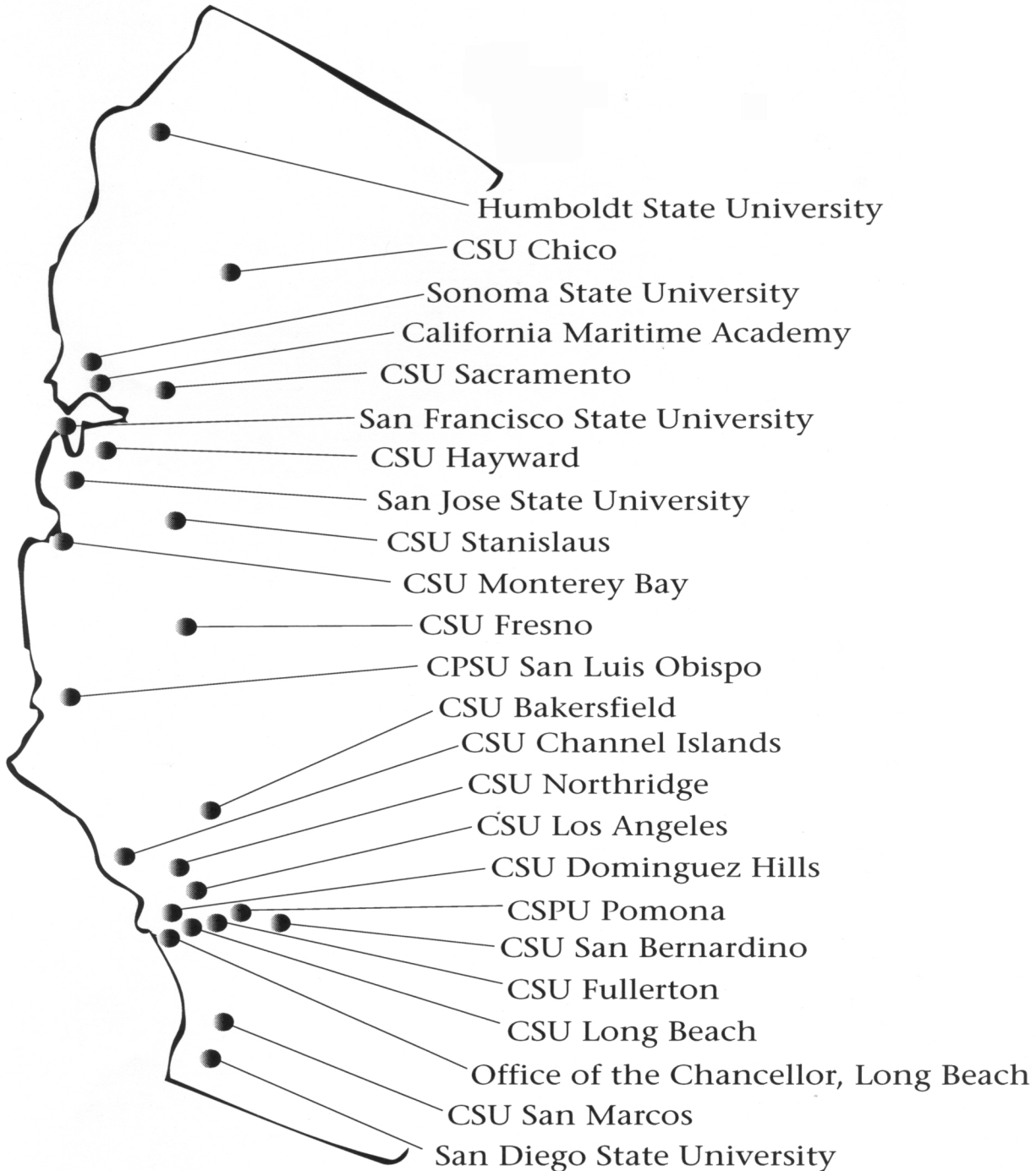
*CSU Council of  
Library Directors*



*June 2000*

# The California State University

<http://www.calstate.edu>



THE CALIFORNIA STATE UNIVERSITY

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# Working Together

*A Strategic Plan for the CSU Libraries*

*CSU Council of Library Directors  
June 2000*



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# Executive Summary

Since the publication of the CSU libraries' first strategic plan in 1994, the rate of innovation in information technologies has accelerated. Information technologies will continue to dramatically change the ways in which knowledge and information are obtained, transforming the instructional process at CSU. Students and faculty members will have an increasing array of tools for retrieving, displaying, and manipulating recorded knowledge and information. They will be able to interact with each other and with a body of knowledge in ways previously unimagined, and their physical location will constitute less and less of a barrier to learning and to information access. This level of electronic information transfer will be facilitated by the ongoing revolution in consumer computing which will place affordable information processing in the hands of the entire campus community.

*Working Together: A Strategic Plan for the CSU Libraries* is a comprehensive update of the CSU Libraries' 1994 strategic plan. It provides a framework for the CSU libraries to exploit creatively the rapid changes affecting information resources. *Working Together* also reflects the importance of blending physical access to information resources with electronically delivered information. Despite the growth of the Internet, some information is still communicated solely via printed books, journals, maps, and artwork in all media.

Acknowledged in *Working Together* is the importance of the library as a physical facility central to the intellectual, cultural, and social

# Executive Summary

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life of the university. The plan reaffirms the importance of the library as a place and a resource critical to student achievement, faculty scholarship and cultural development.

The plan also recognizes the importance of partnership. Students are increasingly engaging in collaborative learning through projects, group study, and learning communities. Library and discipline faculty are joining together to develop new models of instruction and curriculum development, and academic and library planners are exploring joint planning as a means of leveraging resources both within the CSU and within broader consortia of institutions. Increasingly, individuals and institutions are discovering the value of working together.

*Working Together* is a plan for collaboration at the system level; it seeks to identify initiatives that permit the twenty-two CSU libraries to benefit from collective efforts. While these benefits can be significant, the individual campus library retains the central role in delivery of services to students and faculty.

## ***The Challenge of Change***

The accelerating pace of change applies as much to the environment of the academic library as any other institution. Computer and networking technologies, student demographics, scholarly and trade publishing, and the very structure of knowledge itself all represent areas where the library's environment is changing dramatically and at an accelerating pace.

*Working Together* addresses this environment of change in part because of the input of CSU faculty, students, administrators and library staff. Two significant dimensions of change emerged from discussions held with these members of the CSU community: innovation and diversity.



As societal trends with direct impact on the libraries, innovation and diversity guided the development of *Working Together*. CSU libraries will employ emerging technologies to support a learning environment and a curriculum that mirrors the needs of students, and the libraries will support the university as it prepares for the expected enrollment growth of “Tidal Wave II” and the ever-changing demographics of California’s high school graduates.

In response to innovation and diversity, and to the input received from the focus groups, meetings and interviews across the CSU, the Council of Library Directors (COLD) developed five “key planning themes” designed to organize the libraries’ management of change. The themes provided key indicators for reexamining and updating the goals and strategies of the 1994 plan and served to guide the transition from what was accomplished over the past five years to what can be anticipated over the next five.

The themes also reflect systemwide planning initiatives such as *Cornerstones* and efforts to strengthen teacher preparation and prepare for dramatic enrollment growth. The themes are highlighted and addressed in each of the six goal areas of the plan and reflect the key messages conveyed by the users of the CSU libraries:

- *Student-Centered Learning*—Responding to unique student needs through flexible, innovative programs.
- *Availability of and Access to Information Resources*—Ensuring faculty and students can access the materials and electronic resources they want, when they want them.
- *Teacher Preparation*—Supporting the CSU’s emphasis on strengthening the training of California’s teachers.
- *Distance and Distributed Education*—Facilitating access to information resources and instruction regardless of the learner’s location.

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- *Assessment and Educational Outcomes*—Demonstrating the value of library programs and services.

The plan will be guided by these themes and build on the framework and accomplishments of the 1994 plan. The plan is a framework for decisionmaking that will affect management, staffing, allocation of resources, and facilities design. Six key elements comprise the Strategic Plan.

**Values**—Shared commitments and principles

**Vision**—Desired changes and opportunities for the future

**Mission**—Core purposes and roles of the libraries within the CSU community

**Goals**—Results and outcomes the libraries seek to achieve in six broad areas

**Strategies**—Programs, projects and initiatives for achieving the goals, mission, vision, and values

**Key Planning Themes**—Important trends and issues identified during the planning process

## Goal Area A: INFORMATION RESOURCES

Opportunities for providing access to the full text of periodical literature and to a lesser extent books in digital form will continue to grow. At the same time books and periodicals in printed form, as well as video, audio and other materials, will continue as essential components of library acquisitions. The strategies of this goal area acknowledge the need to support academic programs by continuing to provide this diversity in forms of recorded knowledge.

### Strategies

1. Customized Online Access to Information Resources
2. Ongoing User Needs Analysis and Assessment
3. Collection Development and Resource Sharing
4. Access to External Collections and Resources

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## Goal Area B: INSTRUCTION

The ability of students to find, evaluate and use the ever-widening range of information resources is becoming increasingly important. Equally important is the student's understanding of the social and ethical implications of information use, as easily downloadable full-text becomes increasingly available. The Instruction goal area immediately follows Information Resources by design; libraries must closely integrate the strategies of both to support the university's academic programs.

### Strategies

1. Skills Development, Collaboration and Assessment
2. Access to Instructional Modules
3. Faculty Partnerships
4. Distance and Distributed Learning
5. Social and Ethical Responsibilities

## Goal Area C: HUMAN RESOURCES

The CSU libraries are more than collections of books, journals, and databases; they are also organizations of skilled and knowledgeable people who are responsible for a range of functions, including selecting and cataloging books, helping students use databases, installing computer workstations, shelving books, raising funds, and conducting information competence classes. The ability of the CSU libraries to thrive in the face of change depends upon highly skilled, committed, and adaptable people at all levels. Thus, Human Resources remains an important goal area.

### Strategies

1. New Staffing Models
2. Professional Development, Continuing Education, and Recognition
3. Inter-campus Networking and Collaboration
4. Diversity of Staffing

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## Goal Area D: INFRASTRUCTURE

The physical facility of the library will increasingly be supported by networking technology, an “intelligent” structure capable of serving as the full-service hub for access to recorded knowledge and instruction. At the same time, the importance of the library as a place was repeatedly emphasized in focus groups and interviews. The quality of the space in the library is still important to students as they seek quiet, comfortable places for study and research. Space for collaborative learning in groups with ready access to information resources and librarian expertise is also seen as an important feature of the library facility. This goal area addresses the need to provide infrastructure for both people and technology.

### Strategies

1. Library as Place
2. Technology Infrastructure
3. Infrastructure for People with Disabilities

## Goal Area E: FISCAL RESOURCES

A combination of budget reductions, increasing costs, deteriorating purchasing power, and the necessity to invest in ever-expanding electronic resources has created a widening gap between available funding and the costs of maintaining information resources adequate to support the curriculum. The strategies below seek to address ongoing funding constraints so that the CSU's learning communities can benefit from the full potential of library and information resources.

### Strategies

1. Funding for Library Collections
2. Funding for Strategic Initiatives
3. Supplemental Funding
4. Partnerships for Support

## Goal Area F: OUTREACH AND COLLABORATION

This goal area is new to the 2000 strategic plan. It builds on the strategies in the 1994 plan that launched collaborative initiatives with New York's major public university systems and with CSU discipline faculty. The addition of this goal area reflects a dramatic increase in the importance of outreach, networking, and collaboration for libraries of all types.

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## Strategies

1. Outreach to Users
2. Constituency Consultation
3. CSU Planning Linkages
4. Regional and Statewide Activities
5. National and International Involvement

## IMPLEMENTING, MANAGING, AND MONITORING THE PLAN

The success of the first CSU library strategic plan attests to the effectiveness of the implementation process outlined in that plan. As an update of the first plan, *Working Together* continues the emphasis on implementation while introducing several new approaches.

### *First Phase Strategies*

To create a focus for its immediate activities, COLD will launch the plan by advancing six strategies in the first phase of implementation (see list of strategies on page 60). An action plan has been developed for each strategy identifying action steps, lead and supporting responsibilities, resource implications, and timelines. COLD chose the strategies because they directly contribute to realizing the vision of the campus library as “the hub of a full-service information and instruction network.” They also continue the implementation of the major initiatives of the first plan.



### ***Annual Implementation Plans and Updates***

At the end of each year COLD will review the status of the implementation plan to identify any needed adjustments. It will also examine emerging issues and opportunities, such as changes in funding, educational mandates, and user needs. With this background, COLD will review all the strategies of *Working Together* to identify those that should be considered for implementation. The result of the annual review will be an updated implementation plan describing the action agenda for the coming year.

### ***Strategic Planning Committee***

A standing committee of COLD and Chancellor's Office staff will provide oversight and support for strategic planning activities. The committee will coordinate communication regarding planning, manage the planning process, and assist in developing the annual update activities.

### ***Five-Year Update Cycle***

COLD will continue to conduct a comprehensive update process every five years. This process will include in-depth outreach to library constituencies and a comprehensive review of demographic, economic, technological and educational trends.



# Introduction

In September 1994, the Council of Library Directors published its first strategic plan: *Transforming CSU Libraries for the 21st Century*. The five-year plan outlined the Council's goals and strategies for achieving the highest level of support for CSU's academic programs.

Since 1994, the Council has implemented the plan's major projects and initiatives. By networking the resources of the system's twenty-two libraries, the plan led to the development of Pharos, an integrated online search and retrieval tool, as well as programs to enable users to manage and evaluate the growing profusion of information resources. The Academic Information Services Cooperative leveraged the libraries' collective purchasing power for acquiring electronic resources. At the campus level, the plan supported innovative projects including digitized special collections, improved electronic access to special collections, and greater collaboration between faculty and librarians in the delivery of instruction. Overall, the plan has been an effective framework for the Council's collaborative planning and decision-making without dictating campus-level activities.

The last five years have also seen rapid changes in environmental factors affecting library development. Technological innovations have transformed the landscape of information resources, most notably in the dramatic changes the World Wide Web has created in the volume and quality of information available to many users of CSU libraries. The libraries' constituency has changed, as California's population has continued to grow dramatically and evolve toward an increasingly diverse ethnic profile. Finally, the overall context of higher education has changed, as competition from non-traditional sectors continues to increase and policy makers develop new approaches to accountability and performance.

## 1994 LIBRARY STRATEGIC PLAN: Summary of Key Accomplishments

### **Unified Information Access System**

This leading-edge project is designed to provide integrated access to the full range of library resources any place and any time. Known as "Pharos" in its public manifestation (after the lighthouse of ancient Alexandria), this powerful tool will simplify searching, provide direct access to electronic full text, and facilitate interlibrary loan. It incorporates help and instruction in navigating the information universe and can be customized to the type of user.  
<http://uias.calstate.edu>

### **The Academic Information Services Cooperative**

This initiative provides the content for Pharos. It combines the collective purchasing power of twenty-two libraries to acquire a core collection of electronic bibliographic and full text resources available across the system. It also encompasses a system-wide program of document delivery (books and articles) and agreements for expedited borrowing from University of California libraries. A new and innovative project within this initiative is the Journal Access Core Collection consisting of a customized electronic full-text database of selected journal titles most often subscribed to by CSU libraries.  
<http://seir.calstate.edu>

### **Information Competence**

This initiative addresses the problem of making sense of the increasingly complex information environment; students with information competence skills can find, use and evaluate information effectively. Nineteen multi-campus projects have been completed or are presently underway and include both general education and major-specific instructional programs. Several are in the form of Web-based modules that will be incorporated into Pharos. Librarians have developed an information competence fellowship program and have conducted faculty workshops.  
<http://library.csun.edu/susan.curzon/infocomp.html>

### **Facility Planning for the 21st Century**

Library directors collaborated with facility planners, academic administrators and faculty representatives to create a new framework for planning integrated information resources facilities. The report of that task force establishes the basic principles for designing library buildings of the future.  
<http://www.calstate.edu/tier3/SLI/>

### **Copyright Leadership**

Librarians, faculty and administrators from the CSU, the State University of New York, and the City University of New York collaborated to develop principles and guidelines for ownership and fair use of intellectual property and published a widely-acclaimed booklet as a resource for the academic community.  
<http://www.cetus.org>

### **Inter-Institutional Collaboration**

In addition to the work with the New York systems, CSU libraries are collaborating with the California Community Colleges and the University of California in the development of information competence instruction and in consortial purchasing of information resources.  
<http://seir.calstate.edu>

### **Campus-Based Projects**

The 1994 Library Strategic Plan stimulated numerous campus-based projects in addition to the system-wide initiatives outlined above. Among these are digitized special collections, improved electronic access to government documents, electronic reserve systems, and greater collaboration between faculty and librarians in the delivery of instruction.  
<http://calstate.edu/tier3/SLI/>

## The Planning Process

Working Together updates the Libraries' 1994 Strategic Plan by building on the successes of the first plan and responding to changes in the external environment. The planning process, which started in November 1998 and culminated in October 1999, was conducted with the continuing involvement of COLD members and a Strategic Planning Subcommittee of COLD. The process included more than 40 focus groups of faculty, students, and library staff on CSU campuses. In addition, individual and group interviews or meetings were held with leaders of the Commission on Learning Resources and Information Technology, the Academic Senate, Vice Presidents for Academic Affairs, Deans of Continuing and Extended Education, California State Students Association, the Technology Steering Committee, the Chancellor, Vice Chancellors, and others. These groups and many others will be consulted further to assure full discussion of the key elements of Working Together and to facilitate implementation of its recommended strategies.

## Organization of the Plan

Following this introduction, Section II presents COLD's statement of values, vision, and mission, which provides an overall guiding framework for the libraries' ongoing planning and implementation efforts. Section III reviews the major changes that characterize the libraries' planning context and presents five "key planning themes" for responding to change.

Section IV presents the plan's six primary goal areas: Information Resources, Instruction, Human Resources, Infrastructure, Fiscal Resources, and Outreach and Collaboration. Each of these areas includes specific strategies developed by COLD task groups and highlights strategic and themes addressed. The order of strategies within each goal area does not indicate relative importance or priority. Section V presents the Council's approach to implementing, managing and updating the plan.



Meriam Library, Chico



University Library,  
Sacramento



University Library, San Diego



Robert E. Kennedy Library,  
San Luis Obispo



Pollak Library, Fullerton

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# The Values, Vision and Mission of the CSU Library System

The libraries will plan for the future using a guiding framework of values and principles. This section presents the values, vision and mission of the CSU libraries.

## Values

We are committed to service to all users of CSU libraries; the advancement of learning and literacy; intellectual freedom and freedom of inquiry; and unfettered access to recorded knowledge and information.

## Vision

In the 21st Century, CSU students and faculty will interact with each other and with information in ways unimaginable today. Technology will enable students and faculty members to access, retrieve, display, and manipulate a vast array of recorded knowledge and information.

The 21st Century campus library will be the hub of a full-service information and instruction network, designed to facilitate the delivery of recorded knowledge and information. This transformation will change teaching, styles of learning, and modes of scholarly communication. As California becomes an increasingly multicultural society, every student will be able to take full advantage of the electronic age without regard to background or economic status.



## The Values, Future Vision and Mission of the CSU Library System

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The role of CSU campus library faculty and staff—selecting, organizing, and providing instruction in the use of recorded knowledge and information—is central to a successful learning experience. CSU students will know how to find, retrieve, analyze, and select information to meet their needs as scholars, as workers, and as citizens.

The CSU campus library facility will be an “intelligent” structure: its rich technical infrastructure will support on-site and remote use of recorded information and knowledge. It will utilize a variety of storage techniques appropriate to the variety of formats of recorded information and knowledge.

The CSU campus library facility will also continue and enhance its role as a place of learning central to the cultural, social and intellectual life of the university. It will create an inviting environment—physically through facility design and virtually through Web-based online access—that will enrich the learning experience of students pursuing both on-campus and distance education.

### Mission

The 21st Century CSU library will carry out its role by:

**1. Providing access to recorded knowledge, information, and data.**

The library is the campus entity responsible for acquiring, cataloging, preserving, and providing access from any location to recorded knowledge, information, and data in all formats. It will be responsible for ensuring equity of access to all students, regardless of their learning styles or economic circumstances.



**2. Providing instruction and assistance in the use of recorded knowledge and information, and in the design of curricula and instructional methods.**

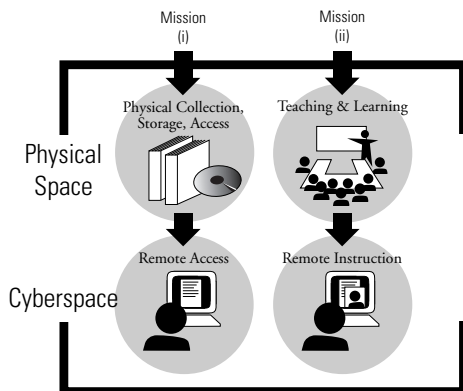
Working in concert with professional and technical staff in the allied fields of computing, media, and telecommunications, library faculty will be responsible for providing instruction in the use of recorded knowledge and information. The librarian’s role in the educational process will be to assist each user in the selecting, accessing, and evaluating recorded knowledge, information, and data that the library provides or to which it gives access.

Library faculty will also play a key role in the educational process by working collaboratively with discipline faculty as they design course materials and methods of instruction that take advantage of emerging instructional and telecommunications technologies as well as recorded knowledge and information that is accessible through the library system and its networks.

**3. Providing comfortable and inviting physical space conducive to individual and interpersonal learning activities.**

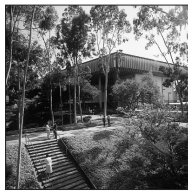
The essential characteristic of the library’s role is that it will be carried out both in physical space and cyberspace. Tomorrow’s library will be the place that preserves an intellectual center of the campus and a primary locus of interpersonal instruction and research relationships, and archival research. Integrated into the main fabric of the University’s educational delivery process, the library’s roles enhance and support the importance of the physical university campus in a world pervaded by electronic technology.

Two functions delivered in two environments





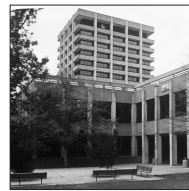
**Walter W. Stiern Library,  
Bakersfield**



**University Library,  
Dominguez Hills**



**Henry Madden Library, Fresno**



**University Library, Hayward**



**J.F.K. Memorial Library,  
Los Angeles**

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# The Challenge of Change

It was Alvin Toffler who first drew popular attention to the accelerating pace of change in the early 1970s. This observation applies as much to the environment of the academic library as any other institution. Computer technology, networking technology, student demographics, scholarly and trade publishing, and the very structure of knowledge itself all represent elements of the library's environment experiencing dramatic, and accelerating, change.

The CSU libraries' strategic plan of 1994 was based on a scan of the external information and technological environments and the internal academic environment. The accomplishments of the 1994 plan, outlined in the previous section, illustrate the success of the libraries in anticipating the 5-year horizon. The Unified Information Access System project, for example, anticipated the dramatic influence of the World Wide Web; the Academic Information Services Cooperative foresaw the great increase in the licensing of information in electronic form.

*Working Together* is a major update and revision of the 1994 plan. Building on the accomplishments of the earlier plan, COLD used different approaches in the 1994 and 1999 planning processes. The goals and strategies of the current plan are detailed in Section IV. The 1994 plan was based on extensive scanning at national, state and local levels that resulted in a detailed itemization of trends and issues, which the plan addressed. While COLD has again surveyed



## The Challenge of Change

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the environment to determine trends and issues likely to influence academic librarianship, the new plan was based more on extensive input from user focus groups and meetings within the CSU. Discussions with students, faculty, library staff and campus and systemwide administrators have helped to make this plan both forward-looking and specific in the ways it will continue to meet the challenge of change to improve and develop library collections and services.

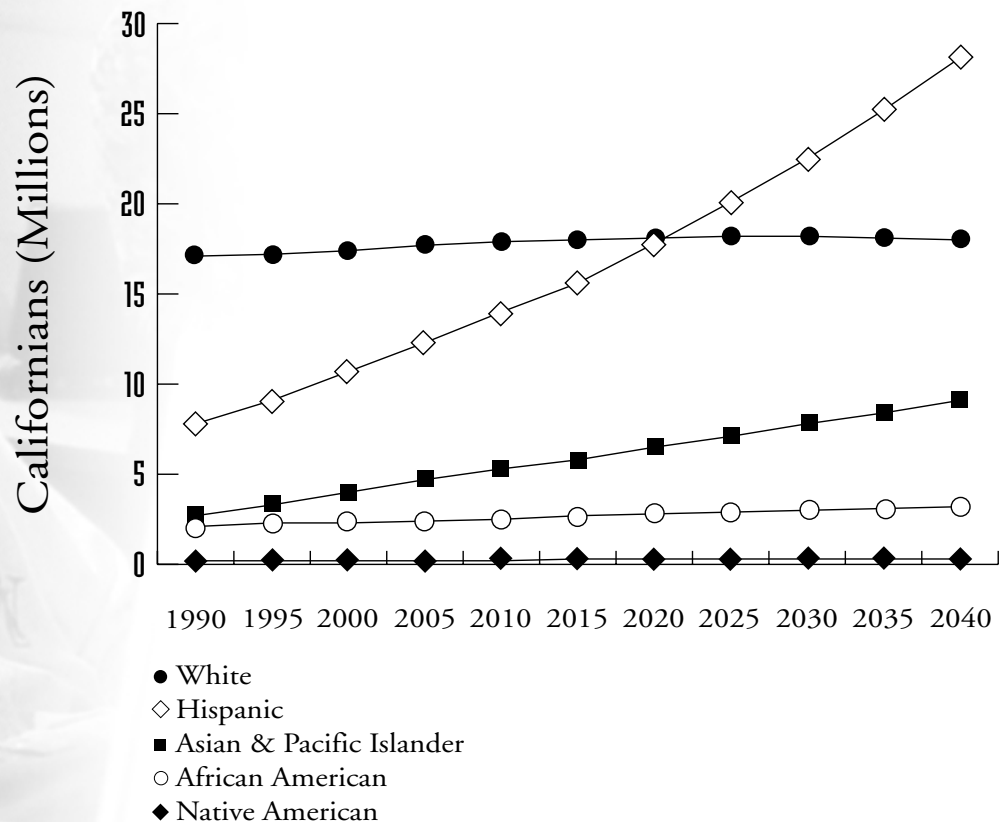
### Dimensions of Change

Two significant dimensions of change emerged from the environmental scanning and discussions within the CSU community. The first is innovation; the second is diversity. They became general themes that helped set the overall context for development of the strategic plan.

New and existing challenges, such as the gap between needs and resources, require continual innovation—new thinking and new solutions. As the institution creating the knowledge workers of the new century, higher education will be profoundly affected by innovation. The importance of new technologies, new business models, and changing markets and customer bases is increasingly emphasized by business and government. The California of the future will not look like the California of the past.

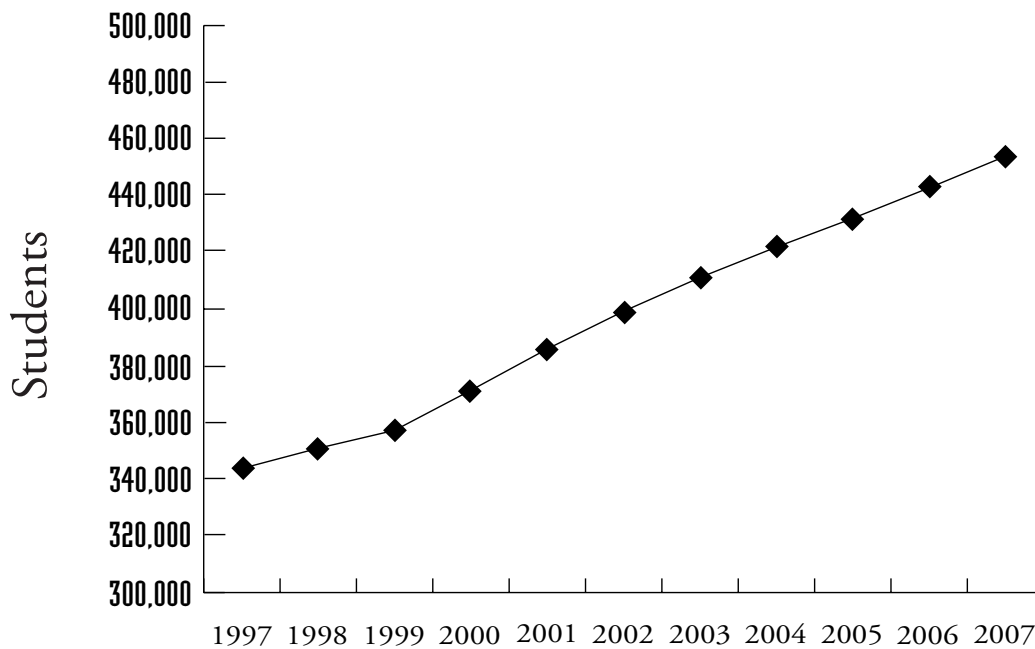
Diversity shapes California in particular and the nation in general. Our citizens represent more cultural and linguistic backgrounds than ever; “waves” of demographic change periodically reshape our institutions. In higher education, the growing and changing student population will create challenges in terms of access, curriculum and learning styles. These students will graduate into a California and a nation that looks quite different than it did in 1994.

### California’s Changing Ethnic Profile





## Projected Total CSU Enrollment



Innovation and diversity represent two overall motifs that have guided the development of the CSU libraries' plan for the next five years. Successful libraries will support a learning environment and a curriculum that mirrors the needs of students, look forward and respond to change, use new and emerging technologies to maximize learning opportunities, and provide the resources to enable the learning community to enter an increasingly complex world. Libraries must also be prepared to support the University as it prepares for the expected enrollment growth of "Tidal Wave II" and as it responds to the ever-changing ethnic makeup of California's high school graduates. CSU libraries intend to be those successful libraries.

## Key Planning Themes

In response to innovation and diversity, and to the input received from the focus groups, meetings, and interviews across the CSU, COLD has developed five “key planning themes” designed to organize the libraries’ response to change. The themes played a key role in the process of reexamining and updating the goals and strategies of the 1994 plan and served to guide the transition from what was accomplished over the past five years to what can be anticipated over the next five.

The themes reflect systemwide planning initiatives such as *Cornerstones*, and efforts to strengthen teacher preparation and to prepare for dramatic enrollment growth. The themes weave through each of the goal areas of the plan and are highlighted in the introductory narrative for each area.

### *Student-Centered Learning*

Both focus groups and environmental scanning emphasized the transition to a different learning community based on learning and the individual learner rather than the teacher and the taught. While library services have traditionally been student-centered and responsive to the information needs of individual learners, the explosion of available information makes precision in finding the best information, or even accurate information, increasingly difficult. Libraries will build on their strong tradition of student-centered services by offering students the tools and skills they require to find, retrieve, evaluate and communicate information in this increasingly complex environment.



### *Availability of and Access to Information Resources*

Again, all environmental and focus group indicators were centered on improving information resources and access to them. Anywhere/anytime access to electronic records and text are a central issue with CSU constituents, but are not the only measure of success. Focus group participants stressed the importance of providing resources that are not available in electronic form. They emphasized the centrality of books, journals, and media resources such as videos, sound recordings and maps to the evolving learning community.

### *Teacher Preparation*

This theme reflects the increasing importance of CSU's role in the preparation of teachers. Those preparing to enter the classroom must be conversant with and confident in using information technology and resources themselves, and equally able to teach these skills to their students. They can develop these skills at CSU and the libraries will play a significant role in preparing teachers who are information literate and can produce students who are likewise information literate. Libraries also play a significant role in making special materials and collections accessible anytime/anyplace to enable teachers to use a variety of materials. The continuing professional development of teachers will, similarly, require new information skills and resources.

### *Distance and Distributed Education*

Distance and distributed education are increasingly important. These models can help to serve the expected "tidal wave" of students while supporting the development of the evolving learning community. Libraries play a central role by providing resources and services necessary



to off-campus students and on-campus students who appreciate anywhere/anytime access. Students enrolled in distance and distributed education programs need access to a wide variety of information resources and library services without unreasonable barriers of distance or time. A full array of library services is critical to the success of these efforts.

### *Assessment and Educational Outcomes*

The effectiveness and the quality of learning outcomes are critical to CSU and all of higher education. External and internal constituencies realize the need to demonstrate the successful results of the higher education experience. As libraries continue to develop their services and resources, it will be incumbent on them to apply resources to meet changing educational needs. CSU libraries also need to develop measures that evaluate the efficacy of those services and resources. Such measures are, in fact, now required by the Legislature to demonstrate the benefits of CSU's technology initiatives. The results of outcome measurements will be reported annually for Pharos, Information Competence, and the Academic Information Services Cooperative.



**University Library, Humboldt**



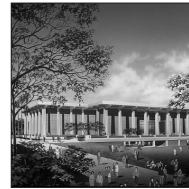
**University Library, Long Beach**



**Library, Maritime Academy**

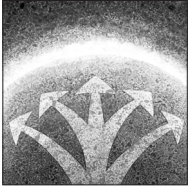


**Library Learning Complex,  
Monterey Bay**



**Delmar T. Oviatt Library,  
Northridge**

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## Goal Areas

This section presents the goals and strategies that the Library Directors will implement to achieve the plan's vision for the future of the CSU's libraries:

- A** Goal A: Information Resources
- B** Goal B: Instruction
- C** Goal C: Human Resources
- D** Goal D: Infrastructure
- E** Goal E: Fiscal Resources
- F** Goal F: Outreach and Collaboration



### INFORMATION RESOURCES

The strategies for accomplishing the Information Resources goals continue and build on the accomplishments of the libraries' 1994 strategic plan. The Pharos project continues as the centerpiece in the effort to provide anytime/anyplace access to the full range of recorded knowledge and information resources. Cooperative purchasing and resource sharing continue as key elements in maximizing the depth and breadth of the resources available to students and faculty.

Opportunities for providing access to the full text of periodical literature in digital form, and to books to a lesser extent will continue to grow. At the same time books and periodicals in printed form, as well as video, audio and other materials, will continue as essential components of library acquisitions. The strategies of this goal area acknowledge the need to support academic programs by continuing to provide this diversity in forms of recorded knowledge.

#### Trends and Issues

The Internet has become a major communication tool for the vast majority of university students and faculty over the past five years. The Web browser has become the standard interface for these academic users. Web users now expect 24-hour access from any location to information resources that can be tailored to meet their particular preferences and information needs. At the same time the number of books published in the United States increased about 42% from 1991 to 1996. Both online and print resources are in high demand.

An increasing proportion of library budgets is being allocated to online resource licensing as libraries increase their dependence on remote access. Students, faculty, and other users now have access to university library Web sites from their home or office. They expect to get as much information as possible in full-text, online, as well as enhanced services for convenient access to books and other physical media.

Key environmental factors influencing these changes include:

- Increasing costs in print and online formats of all library materials, especially journals, continue to exceed the inflation rate for all other services and commodities purchased by higher education institutions.
- “Fair use” rights are increasingly eroded by licensing requirements for online resources.
- Cutbacks continue in subscriptions to print journals while titles available online increase very rapidly.
- Electronic and on-demand publishing of books is gaining increasing attention from the publishing industry. Standards for publishing for the “e-book” device have been agreed on and early models are already on the market. The technology of electronic readers will continue to improve and costs will come down. Security and intellectual property issues for both new and out of print works are now being addressed by authors and the publishers.
- California has passed legislation enabling the Library of California, a long-term effort to networked cooperation



among libraries in all sectors: the State Library; city and county libraries; junior college, college, and university libraries; school libraries and institutional and corporate libraries. CSU libraries, as statewide resource libraries, have been active participants in the planning for this initiative and will continue to be key providers to the community libraries in their regions.

The CSU libraries have been instrumental in networking community college libraries by their leadership in developing 4CNet for access to the Internet, and in providing K-12 educators with valuable resources (as in the California Technology Project).

CSU student, faculty, and librarian focus groups consistently indicated strong support for remote information access, improved interlibrary loan services, stronger and more current local book collections, and current and accurate databases and information resources. Standardized online databases, protocols, and interface technology designed to be user-friendly are important to these groups, but so is a collection of core materials on each campus based on academic programs.

### Goals

- Develop a full spectrum of the information resources most useful to our students and faculty through a combination of collection development, licensing and cooperative agreements. The emphasis will be on materials that are relevant to CSU student and faculty curricular needs and can be shared and accessed most effectively.

### PHAROS: UNIFIED INFORMATION ACCESS

Pharos is the centerpiece of the Libraries' strategy for providing on-line access to information resources and library services. Named after the ancient lighthouse of Alexandria, Pharos provides a range of functions:

- A common web-based interface for full-range of information resources, including bibliographic references, books, articles, Websites.
- A single search statement for multiple databases. This eliminates the time-consuming process of entering and exiting different database systems to search for information on one topic. Information can be researched using a simple "quick search" tool or more advanced search capabilities.
- The ability to search the holdings of all CSU libraries, the libraries of the University of California, and other cooperating libraries. Pharos will also process user's requests for materials through a quick and efficient interlibrary loan and document delivery system.
- Interactive help and guidance for searching and self-paced information competence tutorials for more in-depth assistance.
- Phase II of Pharos will offer customized access to information resources (as described in Strategy 1 of Goal A)

- Provide all CSU students, faculty and other users effective anytime/anyplace access to the most useful information resources for their specific needs.

### Strategy 1

### Customized Online Access to Information Resources

*Provide all CSU users with customized online access to items in CSU collections, licensed resources, free resources, and resources available through cooperative agreements in a single user interface accessible via the Web.*

CSU Pharos, developed over the past four years in response to the 1994 Information Resources Strategy 1, Universal Online Bibliographic Access. Pharos provides all CSU users, including distributed learners and those needing accommodation as required by the Americans with Disabilities Act, a single user interface to all major information resources in an open standards, multi-system environment. As it becomes fully implemented in the next year, it will be a best practice solution to information resource access since it eliminates the multiple Web interfaces the user must learn to use the databases now available.

There is a need to further develop the interface in Pharos so that it offers online access to information resources customized to the needs and interests of the user. The customized interface consists of a number of enhancements to the single user interface. Among them will be saving user searches for future sessions, selective dissemination of information and resource links for the student's courses. For



ease of access the Pharos system will sort available resources in the following priority: 1. Full text or media online, 2. Local library collection, 3. CSU system collections, 4. Collections outside CSU.

### Strategy 2

#### Ongoing User Needs Analysis and Assessment

*Develop and implement mechanisms for systematic analysis and assessment of student and faculty needs and information resources available to meet those needs.*

Information resources developed cooperatively by CSU libraries must meet the needs of CSU library users. To this end, tools will be developed that can be used on an ongoing basis to identify users' needs and the information resources that will best meet those needs. Based on user expectations, standards for online resources and accessibility of shared resources will be developed. Assessment tools to measure the effectiveness of CSU information resources in meeting identified needs will also be developed and implemented.

### Strategy 3

#### Collection Development and Resource Sharing

*Expand initiatives to share CSU systemwide information resources internally, promote cooperation between CSU campus libraries, and develop high quality local collections that meet campus needs.*

The combined resources of the CSU libraries include a collection of over 16 million volumes and over three and one half million unique titles. Pharos will provide a union catalog, which combined with a rapid delivery system, will enable CSU libraries to give their

## RESPONDING TO CHANGE

### KEY PLANNING THEMES

- **Student Centered Learning**—The personalized Pharos information gateway will greatly expand the capacity of students to quickly and easily access the specific information that they are seeking.
- **Access to Collections**—Pharos enables library users to conduct broadcast searches of multiple databases and directly request interlibrary loan and document delivery.
- **Distance and Distributed Learning**—The resources offered through the Pharos system are available anytime/anywhere with a Web browser and Internet connection.
- **Assessment and Educational Outcomes**—Pharos will allow the libraries to assess the success of user searches and information access.



users access to books and journals far more effectively than traditional ILL. To further increase the pool of resources available to CSU students systemwide, CSU libraries will identify unique local collections that are of value to researchers on other campuses and develop mechanisms that will enable those collections to be made available and in some cases digitized.

The size of the CSU library system also permits cost-effective, systemwide access to an extensive and growing array of online academic resources. This cumulative purchasing power will continue to be exploited to its fullest advantage in providing CSU students and faculty with access to the widest possible array of both print and electronic resources.

CSU libraries will utilize the latest database analysis methods and acquisition software to develop and implement cost-effective mechanisms that will facilitate cooperative collection development, especially for its book collections. At the same time, CSU libraries will continue to work together to secure the resources required to strengthen local collections and ensure that essential campus needs can be met locally.

#### Strategy 4

#### Access to External Collections and Resources

*Develop and expand access to external collections, including Internet resources, through sharing arrangements and cooperative agreements.*

CSU libraries will expand the sharing of resources with other California libraries. CSU libraries will also explore the best ways to participate in multitype regional networks and the Library of



California. Joint purchasing agreements to lower costs for online resources will be developed on an ongoing basis. Document delivery, either fully or partly subsidized, will be integrated into Pharos for enhanced access to materials the CSU does not own. Improved systems to make the best quality Web resources available will also be obtained or developed cooperatively.





## INSTRUCTION

Information competence, the ability of students to find, evaluate and use the ever-widening range of information resources, is becoming increasingly important. Equally important is the student's understanding of the social and ethical implications of information use as downloadable full-text becomes increasingly available. The Instruction goal area immediately follows Information Resources by design; libraries must closely integrate the strategies of both to support the university's academic programs.

### Trends and Issues

In the last five years, information competence has emerged as a key component of the national educational agenda. Many universities, accrediting agencies, associations and academic libraries are developing programs to ensure that students possess the necessary information competence skills. There is increasing awareness that students of the Information Age need Information Age skills.

- The major library professional organizations in the United State and abroad have acknowledged the central importance of information competence in the services librarians provide.
- International activities such as professional conferences are being organized to focus on information competence.
- The importance of information competence to success in the workplace is being evaluated world-wide.



The CSU has made substantial progress in information competence. Through grants, workshops and fellowships, every campus has had some level of involvement in information competence. Additionally, there are many products and tutorial modules which faculty can use in the teaching of information competence in the various disciplines.

The efforts of the CSU in information competence have been guided by a set of six key principles. These principles were developed through intensive consultation among library faculty, discipline faculty, and library administrators and were endorsed by the CSU Academic Senate (AS-2409-98/AA, <http://library.csun.edu/susan.curzon/icres.html>).

- 1. Information competence should be taught across the curriculum.**
- 2. Information competence needs to be addressed at all levels—freshman, introduction to the major and graduate level.**
- 3. There needs to be an articulation of information competence skills between the K-12 and the university.**
- 4. Requirements for information competence at the freshman, transfer and senior level should be considered.**
- 5. Tools for faculty to teach information competence should continue to be developed.**
- 6. Emphasis should be placed on faculty development opportunities in information competence.**

The strategies that follow carry forward the 1994 strategic plan's emphasis on information competence instruction and faculty devel-

### INFORMATION COMPETENCE

Addresses the increasing need to be able to navigate the increasingly complex world of information. It is a vital skill at all levels of a student's academic career and in a successful life beyond graduation. Information competence includes the ability to:

- Recognize and define information need;
- Develop effective search strategies for finding information;
- Locate and retrieve relevant information;
- Evaluate and organize the information for use;
- Create and communicate information effectively;
- Understand the legal and ethical dimensions of the use of information;
- Understand points of view and practices employed in presentation of information from all sources.

opment. They have been adjusted, however, to respond to the changing teaching and learning environment of the CSU and to the different information environment confronting students and faculty.

## Goals

- Provide CSU students with information competence skills that will enable them to use knowledge and information effectively.
- Collaborate with CSU discipline faculty to integrate information competence throughout the curriculum.
- Provide faculty development opportunities in information competence.
- Provide organized access to electronic instructional modules developed in any discipline.

## Strategy 1

### Skills Development, Collaboration and Assessment

*Propose requirements for student information competence, create instructional modules and develop assessment plans.*

Information competence is vital to success at all levels of a student's academic career. The ability to recognize an information need, develop effective search strategies, select the appropriate tools, retrieve, evaluate and organize the information is essential for all students. Library and discipline faculty will explore the possibility of information competence as entrance and exit requirements that will not increase units.



In order to determine the success of our information competence program, student skills will need to be assessed. First, an initial assessment will be conducted to determine the current skill level. Then, ongoing assessment will occur to determine student advancement in meeting targeted information competence skills. Discipline faculty will also be surveyed for their opinion of student progress.

## Strategy 2

### Access to Instructional Modules

*Provide access to a wide variety of electronic instructional modules through Pharos.*

Many discipline faculty are making a variety of instructional modules available through the Web. Examples are those offered through the CSU Center for Distributed Learning. In order to facilitate ease of access, the modules need to be organized and accessible through comprehensive information gateways such as Pharos.

## Strategy 3

### Faculty Partnerships

*Provide CSU discipline faculty with opportunities to increase their information competence skills.*

This strategy will provide discipline faculty with opportunities in information competence. Information competence skills are important for faculty in all disciplines, including those involved in teacher preparation in order to ensure that future K-12 teachers can teach information competence in the classroom.

## RESPONDING TO CHANGE

### KEY PLANNING THEMES

- **Student Centered Learning**—Instructional programs in information competence are geared to the needs of the individual learners and will enhance their ability to independently identify, retrieve, and assess information resources throughout their educational careers and work lives.
- **Teacher Preparation**—CSU library faculty will provide information competence training opportunities for faculty involved in the preparation of K-12 teachers.
- **Distance and Distributed Learning**—Pharos will provide self-paced information competence instruction anytime/anyplace via the World Wide Web.
- **Assessment and Educational Outcomes**—Library faculty will implement ongoing assessment measures to gauge students' achievement of the skills associated with information competence.

**Strategy 4**

**Distance and Distributed Learning**

*Develop information competence instructional modules for use in distributed and extended educational programs.*

CSU library faculty will develop information competence “modules” that are applicable in distributed and extended education. The technology will allow delivery and assessment of the content via the World Wide Web or other appropriate technologies, e.g., interactive CD’s, Pharos, etc. The goal is to ensure that, independent of location and time, CSU learners understand the components of information competence and are able to master and apply these components in all current and future learning activities.

Library faculty, in collaboration with discipline faculty, will also develop instructional modules designed to assist faculty teaching in extended education programs. These modules will orient faculty to library resources available to their students and show how those resources can be integrated into the design and delivery of their courses.



## Strategy 5

## Social and Ethical Responsibilities

*Educate CSU students in their social responsibilities in the uses and misuses of information.*

Information comes in many forms—including misinformation and disinformation. Students today must negotiate a wide variety of sources, including copyrighted material, to arrive at information that is valuable. Libraries share with discipline faculty an increased obligation to help students learn to use information honestly and ethically.





## HUMAN RESOURCES

The CSU libraries are more than collections of books, journals, and databases; they are also organizations of skilled and knowledgeable people who are responsible for a range of functions, including selecting and cataloging books and electronic resources, helping students use databases, installing computer workstations, shelving books, raising funds, and conducting information competence classes. The ability of the CSU libraries to thrive in the face of change depends upon highly skilled, committed, and adaptable people at all levels. Thus, Human Resources remains an important goal area.

Based upon their experiences implementing the first strategic plan, members of COLD recognize that the diversity of the CSU system and the size of the State place some limitations on the feasibility of developing systemwide training and professional development programs. Thus, the individual libraries are expected to conduct most of the training that needs to be done. However, the plan does advocate that the CSU libraries use a systemwide approach to developing human resources when efficiencies can be gained by doing so.

One of the accomplishments resulting from the 1994 Strategic Plan was the preparation of the document “The Academic Library in the Information Age: Changing Roles” prepared by the CSU-SUNY-CUNY Joint Committee Work Group on the Role of the Library. The document was distributed and discussed by librarians in and endorsed by the top administrators of all three systems; its key findings and recommendations are reflected in the strategies that follow.



### Trends and Issues

Several trends and issues set the context for the strategies in this goal area:

- New initiatives in the delivery of instruction through technology increasingly will require a team approach in which faculty will work with librarians and computing and media specialists in the design of courses and methods of instruction.
- The CSU is committed to serving the increasingly diverse population in California and has adopted system wide goals and objectives that individual campuses can use as models.
- Flexible staffing models are being increasingly used to enhance efficiency, contain costs, and motivate employees. Strategies such as the use of temporary employees, job enrichment, job sharing, and flexible work arrangements can be examined for their applicability to library operations.
- The private sector and higher education are using “best practices,” identifying and using managed processes, to deliver value to the user. The examination of “best practices” could be useful in identifying opportunities for both incremental and holistic improvement of library operations and services.
- Within the next five years a wave of retirements will result in the need to recruit new personnel.
- Some libraries have implemented team-based organizations to improve efficiency, to maximize the sharing of skills, and to increase their responsiveness to change. The CSU libraries should consider this and other innovative models of organization.

### FACULTY-LIBRARIAN PARTNERSHIPS

The library not only provides a link to the vast information resources available but also is already developing new levels of expertise in both access to and generation of knowledge... library development includes a role as campus leader in the redefinition of knowledge and the transformation of learning.

Ralph A. Wolff  
Executive Director,  
Accrediting Commission  
for Senior Colleges and  
Universities, Western  
Association of Schools  
and Colleges

The strategies that follow carry forward the key goals of the 1994 plan but differ in their scope and emphasis. The “Role of Librarians” strategy has been enlarged to include library assistants and student assistants through the development of new models of library staffing. A revised staff development strategy better reflects activities appropriate at the system level, and a new strategy reflects the importance of diversity of staffing.

## Goals

- Promote and support human resource management practices which ensure the most effective utilization of all staff in an environment of continuous technological change.
- Collaborate with discipline faculty to continue to enrich the role of library faculty in the teaching and learning process. In particular, support the use and integration of new information, networking, and instructional technologies.
- Develop human resources in CSU libraries to interact and work effectively with students and faculty having increasingly diverse circumstances and learning needs.

## Strategy 1

### New Staffing Models

*Engage in continuing evaluation of current and emerging tasks, redefining the roles and responsibilities of library faculty, staff, and other*



*professionals as appropriate to recognize changes resulting from the introduction of new technologies and CSU system initiatives.*

In response to technological changes and systemwide initiatives, libraries have taken on new responsibilities while maintaining traditional services. Most often these new responsibilities have been carried out with existing personnel. Thus, to make the most effective use of all available human resources, libraries must continually reassess how work is organized and the level of staff most appropriate to perform each function. Some libraries have used a team-based approach as a means of initiating a reorganization or restructuring. This is but one model for change; others must be investigated.

Examples of redefined roles already exist in CSU libraries as the libraries have adopted some of the recommendations outlined in the 1996 document on changing roles produced by a Joint Committee of the CSU, SUNY and CUNY systems ([http://www.cetus.org/acad\\_lib.pdf](http://www.cetus.org/acad_lib.pdf)). While library faculty continue to be responsible for the traditional range of professional duties including selecting, organizing and guiding access to information resources, some of their responsibilities have been redirected to library assistants. This redirection enables library faculty to become more involved in the teaching-learning process. For instance, library assistants staff information services desks, helping students and faculty locate resources through electronic catalogs and providing answers to simple inquiries. In some libraries, library assistants are also paired with library faculty at the reference desk.

The Library Assistant Classification Series must reflect and support the changing roles of library assistants. The CSU libraries will

### RESPONDING TO CHANGE

#### KEY PLANNING THEMES

The strategies in this goal area address all the key planning themes by enhancing the capacity of library staff to respond to the changing information and educational environments. For example, the strategy to develop new staffing models will increase opportunities for library faculty to engage in the teaching and learning process and to track educational outcomes and for support staff to play a more active role in assisting students and faculty locate resources.

propose the review and re-evaluation of the Library Assistant Series to gain more flexibility in redefining jobs as they continue to change, to recognize skill development and to provide an appropriate compensation and reward system.

Student assistants perform many essential services in libraries. They have long been the mainstays for such tasks as staffing circulation desks, re-shelving books and journals, and processing library materials. More recently they have been assigned to new tasks, such as assisting other students in using library computers and printers, installing computer equipment and software, serving as library patrols, and working at information desks. The CSU libraries will continue to encourage the innovative use of student assistants.

In addition to addressing the changing roles of current staff, libraries will continue to diversify the mix of library personnel by including new professional positions. For instance, there is an increasing need in libraries for network administrators, Web designers and administrators, instructional technologists and development officers to provide the expertise necessary to meet new expectations. Furthermore, there is a need to integrate these professionals into the culture of the library.





### Strategy 2

### Professional Development, Continuing Education, and Recognition

*Continue to provide continuing education and training opportunities for library faculty, staff, and other professionals to support them in their changing roles and in the development and implementation of new services.*

The need for library faculty and staff to keep abreast of technology and to meet new expectations calls for new programs of professional and staff development. The CSU libraries will foster a comprehensive program of education and training to promote the development of new skills. Although the individual campuses are in a better position to ascertain training needs and develop appropriate programs, there are opportunities for promoting professional development at the system level. For instance, the CSU will explore the possibility of contracting with training consultants/organizations to provide training and staff development. In the last few years the CSU offered grants to librarians to conduct information competence projects. This was a successful means of encouraging innovative programs. Similar grant programs will be developed to support innovative services, assessment projects, and applied research projects in the future.

**Information Resources and Technology.** Due to the increasing number of electronic resources and services, the interaction of library personnel with library users (on campus and remote) has changed and expanded and will continue to do so. Technical skills are critical to enable library faculty to not only navigate the Internet, but also instruct and guide information seekers. Skills such as adaptability, flexibility, problem solving, and critical thinking are also needed.

Understanding copyright and intellectual property laws is important in a digital environment that allows easy replication and distribution of information. The rapid growth of the World Wide Web and the trend toward interdisciplinary programs requires library faculty to view sources of information from a holistic, interdisciplinary perspective.

**Diversity.** Diversity is recognized as a strength and an asset throughout the CSU; however, library personnel must be prepared to respond to the needs of a student population reflecting a wide range of ethnic backgrounds, learning styles, and academic backgrounds. This applies equally to those persons working with students on a one-to-one basis at a reference desk, teaching in a classroom, and developing instructional materials.

**Recognition.** Recognition of library faculty and staff achievements can be a good motivational tool. Although there are programs to recognize and reward library faculty for their achievements, there are no such programs for library staff. The CSU libraries will support the establishment of a systemwide award for outstanding staff.

### Strategy 3

### Inter-campus Networking and Collaboration

*Develop networking tools and vehicles to enable library faculty, staff, and other professionals to share their expertise, to facilitate CSU system wide collaboration in the design and delivery of information, instruction, and other services for students and faculty.*



The value of the breadth of expertise among CSU library personnel has been recognized for many years, and formal and informal sharing via telephone and meetings has been common. The emergence of the Internet and other technologies, however, has provided more opportunities for much greater collaboration among staff. This collaboration should be expanded and pursued through new partnerships with academic, K-12, civic, governmental and corporate partners.

Besides sharing expertise, collaboration among library faculty can yield benefits in the avoidance of duplicated efforts in such areas as design of Web-based instruction. Multi-campus teams sharing their talents can design instructional modules responsive to the full range of student needs and backgrounds, rather than each campus developing its own modules.

The Pharos project has been an excellent example of the power of multi-campus teams to share expertise and produce high quality work. This strategy seeks to continue and expand project-based inter-campus networking and collaboration through both traditional face-to-face meetings and through technologies such as e-mail reflector lists, video-conferencing, and the World Wide Web. The CSU libraries need to consider means of supporting personnel who are involved in systemwide projects. Reimbursing the campus libraries for travel and staff-time spent on system projects are two such options.



## Strategy 4

## Diversity of Staffing

*Increase the diversity of the library faculty and staff.*

The CSU libraries continue to be committed to building and maintaining a diverse workforce that is representative of the availability of individuals with requisite skills in each component of its organization: management, faculty, staff, and student assistants. The CSU libraries are committed to recruiting, training and mentoring which will foster this objective and to maintaining a work environment which values tolerance and respect for all.

With the state's rapidly changing demographics and the emergence of minority groups that have been historically underrepresented in the CSU, implementation of this strategy will be necessary to reflect the new “minority-majority” population in California. Diversity is also reflected in the increasing number of older students and students with disabilities who are enrolling in the CSU.

In order to accomplish this strategy, the CSU libraries need to develop a staff “forgivable loan” program to enable underrepresented staff to attend library programs. Other options include coordinating recruitment efforts with existing minority internship programs and establishing a strong liaison with the San Jose State Library School to recruit more minority library faculty and to bring its programs to all areas of the state via distant learning.



## INFRASTRUCTURE

The importance of strategic planning for library infrastructure is underscored by its emphasis in the CSU libraries' Vision Statement. That vision describes a physical facility of the library supported by networking technology, an "intelligent" structure capable of serving as the full-service hub for access to recorded knowledge and instruction.

The components of the modern library that work together to achieve this vision include: centrally placed library facilities for housing information resources and human resources; connections to places on and off campus at which recorded knowledge and information services can be delivered (classrooms, offices, dormitories, homes, and other distant locations); hardware and software to facilitate utilization and communication; and broad-band networks linking to other libraries and the Internet.

### Trends and Issues

The demand for and availability of remotely accessed electronic information resources, including full text of journal articles and books, will continue to put pressure on libraries and universities to upgrade their infrastructures. For libraries, this means more and faster computer workstations and internal networks; for universities it means added capacity for intra-campus networks, more student and faculty workstations, and expanded programs for training and support.

At the university level, the CSU is responding to infrastructure demands through its Telecommunications Infrastructure Initiative. That systemwide initiative is aimed at building the capacity and

support on each campus, and the network across the campuses, to position the CSU to fully exploit the potential of information technology in teaching and learning. At the library level, the strategies in this goal area are designed to ensure full participation in and support for achieving that potential.

While much attention will be focused on information technology and network development, the importance of the library as a place was repeatedly emphasized in focus groups and interviews. The quality of the space in the library is still important to students as they seek quiet, comfortable places for study and research. Space for collaborative learning in groups with ready access to information resources and librarian expertise is also seen as an important feature of the library facility.

Recognizing the importance of balancing both roles of the library—campus hub for information access and quality space for learning and research—the strategies that follow will continue the directions set forth in the 1994 strategic plan and the 1996 document “Information Resources Facilities for the 21st Century: A Framework for Planning.” That document established planning guidelines for libraries that integrate a wide range of instructional resources and services.

## Goal

- Provide an infrastructure that will support the physical and access requirements of the students and faculty of the 21st Century.



### Strategy 1

### Library as Place

*Emphasize the importance of the library as a “place” for human interaction and reaffirm its continuing role in campus life.*

Given the high degree of importance that CSU students, faculty, and administrators assigned (in the focus groups) to the role of the library as a center of scholarly life, COLD should reaffirm the continuing need for new and/or expanded and remodeled physical facilities, with enhanced technology capability, per the 1991 CSU Library Space Standards and the report of the 1996 Task Force report affirming the 1991 Standards. The report calls for library facilities integrating new technologies to support electronic information access and instruction. New technologies to support electronic information access and instruction. New technologies will occupy at least 20 percent of new and remodeled facilities, and that 20 percent will be funded at a higher level than space devoted to more traditional library activities. Funding for such facilities will be a priority for CSU libraries. These physical facilities will:

- House all needed collections and resources.
- Provide space for training and instructional activities.
- Provide functional space and resources for library personnel.
- Provide access to collections and library resources, and to training and assistance in their use.
- Provide ample study space for individuals and groups in an appropriate learning environment.

### THE INTEGRATED INFORMATION RESOURCE FACILITY

In response to dramatically changing information and instructional technologies, CSU libraries are changing their focus from management of printed material to active instructional facilities providing both local and remote access to print, non-print and electronic resources. The Task Force proposes a model which reshapes the current standards for libraries to allow individual campuses to integrate a variety of services into library building projects, i.e., the “integrated information resource facility.” The integrated information resource facility is defined as a facility not only integrating functions within a building but throughout the campus and beyond via telecommunication and information technology. Space is needed for emerging technologies that are being integrated into electronic library services and delivery. Space is needed for people to come together to learn about the emerging technologies and new information resources. Professionals in libraries, media and academic computing require facilities to provide active instruction for students and faculty.

*From “Information Resource Facilities for the 21st Century: A Framework for Planning,” California State University Task Force on Facility Planning for Library and Information Resources*  
<http://www.calstate.edu/tier3/SLI/>

- Integrate current, new, and emerging technologies for the use of recorded knowledge, information, and data.

In addition to these basic elements, libraries will include in their planning the incorporation of richer spaces for human interaction. “Quality” of space as well as quantity and technical infrastructure will be an important consideration for planning new, remodeled or renovated facilities.

Libraries must supply the quality space needed to promote learning and scholarship. When planning library facilities, existing space standards will be used to include library instruction labs, group study areas, consultation areas and other spaces for interacting with students and other users in ways that are in keeping with modern pedagogical methods.

## Strategy 2

## Technology Infrastructure

*Establish mechanisms to assure periodic “technological refreshment” of network capacity, hardware and software in CSU libraries.*

Full build-out of the CSU technology infrastructure is essential to the success of this strategic plan. Pharos, for example, is dependent on the technology infrastructure. Systemwide initiatives and systemwide planning beyond that done in the library area will be a continuing need for CSU libraries. CSU libraries must work at system, national, and international levels to meet the need of faculty and students for ever-increasing network bandwidth and library workstation infrastructure. Libraries will also support Internet II and open standards as key elements of library infrastructure. The following are among the most pressing issues regarding technology infrastructure:



- Libraries need to supply the Internet capacity for maximum use, not just average use. This increases the loads on network routers and other parts of the network infrastructure. Frequent, significant expansion of the network will be a continuing need.
- Libraries need particularly robust systems of workstations and networks to meet the requirement for “anywhere/any time” service. This requires funding for continual updating and ongoing maintenance.

### Strategy 3

### Infrastructure for People with Disabilities

*Assure that requirements of persons with disabilities are accommodated in hardware and software and in licensed information products, e.g., Web-based products.*

Hardware and software producers and information vendors have often failed to give adequate attention to the needs of disabled citizens. The CSU must use its size and influence to encourage these vendors to provide for the needs of disabled students, faculty and staff. Libraries must cooperate in systemwide efforts to define baseline standards to users with disabilities and to select hardware and software that meets baseline standards.

## RESPONDING TO CHANGE

### KEY PLANNING THEMES

- **Student Centered Learning**—These strategies focus on creating quality spaces for student interaction and active learning.
- **Access to Collections**—The infrastructure of libraries will change dramatically to create libraries that are the hub of a full-service information and instruction network.
- **Distance and Distributed Learning**—Libraries will increasingly make resources available outside of their physical facilities through document delivery and on-line access.



## FISCAL RESOURCES

The Fiscal Resources goal area is carried forward from the 1994 strategic plan. The strategies below address the CSU libraries' continuing funding difficulties by seeking to leverage investment in information resources at the system level and by identifying new models of information access that optimize available funding. Libraries will also continue to seek State funding to restore lost purchasing power for collections that resulted from budget reductions in the early 1990s and increasing costs of information resources.

### Trends and Issues

Most financing systems for higher education do not adjust for increases in expenditures for library collections or the costs of technological infrastructure associated with the emerging digital library. However, an increasing number of higher education institutions are beginning to view information technology as a transformative investment strategy for organizational realignment, and a means to improve teaching and learning and to leverage institutional resources.

Institutions of higher education are in an era in which their strengths in human resources and associated intellectual capital can be used for their competitive advantage in fostering collaborative partnerships and generating new sources of revenues. Key trends include:

- Costs of information resources, including electronic resources, will continue to increase at a rate greater than the Consumer Price Index.
- Private sources of revenue will comprise a larger proportion of funding for public higher education institutions.



- State funding will not increase to keep pace with demand and limited resources will hamper growth.

The impact of these trends on CSU libraries was documented in a 1998 report of a task force comprised of faculty, vice presidents for academic affairs, graduate deans, library directors and Chancellor's Office staff. Below are highlights from the findings of the CSU Task Force on Library Collections.

- Reductions in expenditures for library acquisitions by CSU's libraries began in FY 91/92, a year before general fund expenditures throughout CSU were cut. In addition to occurring a year ahead of cuts in general fund expenditures for the university as a whole, library acquisitions expenditures were reduced by a larger percentage.
- Library acquisitions expenditures have recovered more slowly than General fund expenditures as a whole. The library portion of all general fund expenditures has thus declined by 11 percent over seven fiscal years. In effect, there has been a reallocation of funding away from the library.
- Using a methodology approved by the California Department of Finance and employed in its annual "Price Letter" to state agencies, the prices of library books increased 29% between FY 90/91 and FY 97/98. The prices of journal subscriptions increased 87% in the same period.
- In FY 90/91 nineteen libraries paid for 63,822 subscriptions; in 96/97 twenty-two libraries paid 47,310 subscriptions, a twenty-six (26) percent cancellation rate.

### THE COST OF INFORMATION ACCESS

While electronic information access initiatives show benefits for enhancing access to and use of information resources, there is no indication that technology is yielding an overall reduction in the costs of information access, certainly not to the degree that offsets the reduction in acquisition budgets.

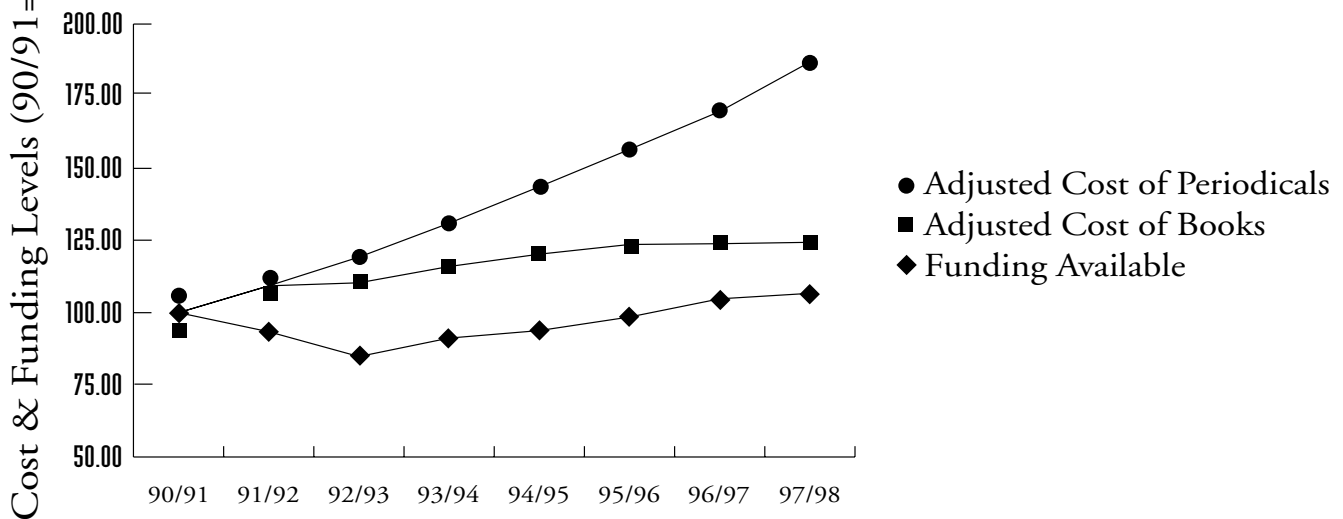
*From "Report of the Task Force on Library Collections," California State University Task Force on Library Collections  
<http://www.calstate.edu/tier3/SLI/>*



- In FY 90/91 nineteen libraries purchased 263,379 books; in FY 95/96 twenty-two libraries purchased 226,668 books a decrease of fourteen (14) percent.
- The annual shortfall in library purchasing power is acknowledged as a structural budget deficiency by the State. The FY 2000/2001 CSU budget request identifies the shortfall as \$12 million systemwide.

The combination of budget reductions, cost increases, and the necessity to invest in ever-expanding electronic resources clearly demonstrates the need for establishing adequate and stable funding

Effects of Inflation on Library Materials Purchasing





for library resources and services. It also demonstrates the need for seeking new sources of funds and for identifying means of optimizing the use of funding available at both campus and system levels.

### Goal

- Establish a stable foundation of multiple and diverse funding sources for information resources and services.

### Strategy 1

#### Stable Funding for Library Collections

*Advocate for funding to redress deficiencies in budgets for library collections and optimize the use of available funds.*

While continuing to advocate for additional funding to redress State recognized deficiencies in budgets for library collections, CSU libraries will continue to pursue collaborative measures designed to optimize the use of available funds. Consortial purchasing of information resources, collaborative collection development, enhanced resource sharing, and system wide licensing of electronic full text are examples of system-level efforts designed to stretch the purchasing power of limited funding. CSU libraries will identify and exploit emerging technologies that demonstrate the potential for increased cost-effectiveness and enhanced access to information resources for students and faculty.

### Strategy 2

#### Funding for Strategic Initiatives

*Seek ongoing systemwide funding of shared projects as Pharos, consortial purchasing, and other COLD initiatives.*

## RESPONDING TO CHANGE

### KEY PLANNING THEMES

This goal area directly addresses the strategic theme of Access to Collections. Stable and adequate funding for collections is necessary to provide the full range of resources required to support academic programs.

COLD will seek funding for strategic initiatives that leverage the size and importance of the CSU to achieve shared goals and consortium pricing. To ensure year-to-year continuity and progress for these initiatives, COLD and the Chancellor's Office will work together to pursue an approach to multi-year funding. System-level support will be sought for areas where central, coordinated staffing is most appropriate, or where functions require a high degree of technical expertise that would be very costly to staff at multiple campuses.

### Strategy 3

### Supplemental Funding

*Seek supplemental funding from a diversity of sources.*

CSU libraries must identify supplemental funding from new sources. CSU should be an active partner with the Library of California because it is a critical resource for statewide resource sharing among academic, special, public and school libraries. Active participation will help to ensure an ongoing reimbursement strategy to CSU for participation. CSU libraries must also identify strategies to leverage the capital investment in Pharos where Pharos can add value to other academic libraries in California. Another important activity of this strategy is encouragement and coordination of multi-campus proposals for externally funded projects by federal and state governments, foundations and other private sector sponsors. Finally, CSU libraries must work at the system level for the inclusion of library infrastructure within the scope of any technology fees at system or campus level. It will be incumbent on COLD to identify any potential partners as the strategic goals are implemented.



### Strategy 4

### Partnerships for Support

*Support partnerships that leverage resources, including in-kind materials and equipment, with other groups in CSU and beyond.*

CSU libraries serve as dynamic gateways to various segments of the campus, other campuses and community users. Many opportunities exist for libraries to be entrepreneurial. Examples include efforts to serve alumni, seniors, continuing education programs, and distance and distributed education.



## OUTREACH AND COLLABORATION

This goal area is new to the 2000 strategic plan. It builds on the strategies in the 1994 plan that launched collaborative initiatives with New York's major public university systems and with CSU discipline faculty. The addition of this goal area reflects a dramatic increase in the importance of outreach, networking, and collaboration for libraries of all types.

With the increasing sophistication of information search, retrieval and management tools, libraries will need to continually provide updated information to their patrons on the availability and use of new services. Similarly, as the use of information evolves, an opportunity exists for librarians to enter into new partnerships with discipline faculty to design course modules and integrate information competency instruction. Furthermore, the libraries' patrons have increasingly diverse demographics, life situations, and educational goals, requiring the libraries to regularly assess user needs and develop innovative responses.

Building on the successes of the 1994 plan, there are increased opportunities to work collaboratively with other affinity groups in CSU, for example, informational resource managers, directors of academic technology, and deans of continuing/extended education. These opportunities are being created by the increasing convergence of information technologies.



### Trends and Issues

Several national and international trends are increasing the need for collaboration. As the Internet accelerates the worldwide networking of information resources, “metadata” initiatives aimed at organizing and facilitating access to the Web and network development projects (e.g., Internet2 and California's CENIC) create opportunities for CSU libraries to participate in the development of new information-management frameworks. The CSU libraries are also pursuing consortial purchasing and participating in national library organizations to reduce costs and negotiate favorable licensing terms with publishers of online databases and journals. CSU libraries may someday pursue these approaches with the publishers of “e-books” and providers of online customized printing on demand.

Within California, the Library of California has been established and funded by legislation to foster regional and statewide collaboration among all types of libraries to enhance the quality of service to library users. Also, the University of California and the California State Library have jointly launched the California Digital Library to expand the array of online information resources available to the citizens of California, initially focusing on science and technology research. The CDL will become an increasingly valuable resource to CSU students and faculty.

Within the CSU, changing student demographics and the impending effects of “Tidal Wave II” will stimulate new approaches to the delivery of instruction, such as year-round campus operations, distributed learning, and expanded extended education programs. All of these measures can profoundly affect how libraries serve stu-

### COMMUNICATING AND COLLABORATING

Since the 1994 COLD Strategic Plan was published, the libraries have developed Pharos, an innovative, on-line system for finding and retrieving information, and offered an increasing range of electronic resources in other formats. The next years will see an even greater range of services and increasing need to “get the word out” to library users.

At the same time, the libraries are engaging in a greater number of partnerships with increasingly diverse organizations. Legislative and economic changes are creating opportunities for CSU libraries to collaborate with other academic and public libraries, as well as governmental agencies and private businesses.

dents and faculty and call for partnering efforts to develop and deliver new service models. There is also an increasing need for COLD to monitor and contribute to ongoing systemwide planning and technology initiatives, such as *Cornerstones* and the Instructional Management System (IMS) and the Collaborative Management Systems (CMS) projects. Respectively, these efforts are aimed at setting the overall direction of the CSU and developing systemwide information technology efforts.

## Goals

- Increase awareness and understanding of library services and their importance in teaching and learning
- Increase the effectiveness of CSU libraries through collaboration at regional, statewide and national levels.

## Strategy 1

### Outreach to Users

*Educate users about library services and programs through a variety of media.*

Libraries are significantly changing the way they deliver information services and resources. Information technology, which is subject to rapid and dramatic innovations, drives much of this change.

CSU Libraries will continue to inform users about the evolving array of library programs and services. The libraries will provide timely updates on the addition of new services and programs and on



the phasing out of obsolete functions. Libraries will continue to reach users using Web pages and print approaches such as brochures and signage. Other innovative approaches can also be explored, such as library advisory boards and faculty docent programs.

A primary objective is to expand student and faculty perceptions about the changing role of the library in teaching, learning and research. As electronic information tools continue to increase in sophistication and coverage, libraries will need to orient undergraduate students, graduate students, and faculty to new research sources and methods. As new models for collaborative learning and technology-mediated scholarship continue to develop, libraries will also need to orient users to new ways libraries will be used.

### Strategy 2

### Constituency Consultation

*Create and implement a plan for communication and consultation with university constituencies (e.g., surveys, focus groups, joint meetings).*

Libraries will engage in regular outreach to their constituencies as they develop and implement new services. The need for consultation is heightened by ongoing transitions in educational roles and delivery approaches, for example, distributed learning, mediated instruction, continuing education and curricular integration. Each of these examples involves several potential partners and important policy and funding issues.

A systematic approach is needed to engage in in-depth consultation with key constituencies. In addition to traditional needs assessment, the libraries will pursue face-to-face approaches to enhance

### RESPONDING TO CHANGE

#### KEY PLANNING THEMES

This goal area directly addresses the strategic theme of Access to Collections. Stable and adequate funding for collections is necessary to provide the full range of resources required to support academic programs.



mutual understanding and information exchange across organizational lines. Key areas of focus will include efforts to expand dialogue with academic administrators, deans of continuing and extended education, and those involved in developing distributed educational approaches. Increased dialog and collaboration between library faculty and discipline faculty is also an important element of this strategy.

### Strategy 3

### CSU Planning Linkages

*Establish positive working relationships with other CSU related planning efforts.*

The CSU is engaged in several systemwide planning initiatives with implications for the future of the libraries (for example, *Cornerstones*, the Instructional Management System Initiative, the Technology Infrastructure Initiative, and Collaborative Management Systems). The Council of Library Directors will continue to monitor these efforts and seek to contribute their unique perspectives, especially regarding issues concerning information competency and information resources. The libraries' established planning framework provides the foundation for contributing to the dialogue on the future of education in the CSU.

### Strategy 4

### Regional and Statewide Activities

*Establish formal liaisons with statewide activities affecting CSU libraries (e.g., Library of California, California Digital Library).*



## Outreach and Collaboration

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The Library of California, recently enacted and funded by the California legislature, will result in a transformation in how all libraries in the state cooperate and share resources. The resource sharing strategies of Goal Area A underscore the importance of this initiative. CSU libraries have been represented in all stages of the planning for the Library of California and will continue to participate in the formation of the regional multi-type library networks and other statewide initiatives. CSU libraries will also seek a voice via formal liaison in the ongoing governance of the Library of California.

Another statewide project important to the CSU is the newly-formed California Digital Library. The resources of the CDL, a project of the University of California and the California State Library, can potentially benefit CSU students and faculty through integration into the Pharos array of online information resources. It is important for CSU libraries to maintain close involvement as the CDL develops and expands in scope.

### Strategy 5

### National and International Involvement

*Increase CSU presence on national and international library information initiatives (e.g., copyright, national standards, etc.)*

CSU libraries must continue and expand their involvement in the many national and international initiatives affecting libraries and information resources. As the largest system of universities in the country, the CSU should have a voice in the establishment of library-related technical standards, the drafting of regulations on copyright and licensing of online information, and the efforts to

organize the resources of the Internet. The national dialog on copyright and fair use in the digital environment will continue, requiring participation by academic libraries as legislation is introduced and court rulings are handed down.

Another area of concern to the CSU is the evolving accreditation environment. Accrediting agencies for higher education across the country are rethinking the role of library services and resources in the development and application of standards for accreditation. CSU libraries will seek to participate in that rethinking through continued involvement with the Western Association of Schools and Colleges.



University Library, Pomona



University Library,  
San Bernardino



J. Paul Leonard Library,  
San Francisco



University/Public Library,  
San Jose



University Library,  
San Marcos

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# Implementing, Managing, and Monitoring the Plan

The success of the first CSU Library Strategic Plan attests to the effectiveness of the implementation process outlined in that plan. This updated strategic plan continues the emphasis on implementation while introducing several new approaches.

The changes increase both the focus and flexibility of actions undertaken to realize the plan's goals. Implementation will initially be focused on six high-priority strategies, creating a manageable set of priorities. After the first year, and annually thereafter, library directors will assess progress and update the priorities to respond to changing issues and circumstances. Through this update process, COLD will refine and implement the remaining strategies in the plan.

As with the 1994 plan, COLD will conduct additional analysis and ongoing consultation in connection with its implementation activities. The results of these activities will identify actions that are feasible, cost-effective and responsive to the needs of the libraries' users and constituencies.

## *First Phase Strategies*

To create a focus for immediate implementation, COLD will launch the updated plan by implementing six strategies. For each of the strategies, the Council has developed an action plan identifying action steps, lead and supporting responsibilities, resource implications, and timelines.



## Implementing, Managing, and Monitoring the Plan

The Council chose the strategies because they directly contribute to realizing the vision of the campus library as “the hub of a full-service information and instruction network.” They also continue the implementation of the major initiatives of the first plan.

By starting implementation with a manageable set of strategies, the Council will focus its resources and increase the likelihood of success. As significant progress is achieved, the Council will evaluate and prioritize the remaining strategies for action. By phasing implementation in this way, the plan creates flexibility to respond to changing circumstances.

### *Annual Implementation Plans, Updates and Assessment*

An annual implementation plan will highlight the Council’s objectives for the upcoming year, including the actions, responsibilities and milestones, and assessment criteria for each strategy to be pursued.

At the end of each year, library directors will assess progress and review the status of the implementation plan to identify any needed adjustments. They will also review emerging issues and opportunities, such as changes in funding, educational mandates, and user needs. With this background, the Council will also review all of the strategic plan’s strategies to identify those that should be considered for implementation. The result of the annual review will be an updated implementation plan describing COLIS’s action agenda for the coming year.

### **FIRST PHASE STRATEGIES**

- A1: Customized Online Access to Information Resources
- B1: Skills Development, Collaboration and Assessment
- C2: Professional Development, Continuing, Education and Recognition
- D2: Technology Infrastructure
- E2: Funding for Strategic Initiatives
- F1: Outreach to Users

***Strategic Planning Committee***

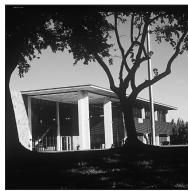
A standing committee of library directors and Chancellor's Office staff will provide oversight and support for strategic planning activities. The committee will coordinate communication regarding planning, manage the planning process, and assist in developing the annual assessment and update activities.

***Five-Year Update Cycle***

The Council will continue to conduct a comprehensive update process every five years. These processes will include in-depth outreach to library constituencies and a comprehensive review of demographic, economic, technological and educational trends.



**Shultz Information Center,  
Sonoma**



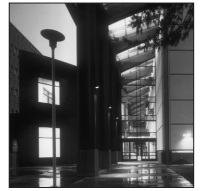
**J. Burton Vasche Library,  
Stanislaus**



**Library, Channel Islands**



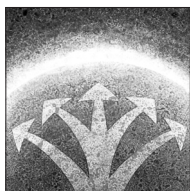
**Robert E. Kennedy Library,  
San Luis Obispo**



**University Library, Fullerton**

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## Appendix A

### *CSU Library Publications*

California State University Council of Library Directors,  
Transforming Libraries for the 21st Century: A Strategic Plan of the  
CSU Council of Library Directors, September 1994. <sup>1</sup>

The following documents were developed in response to the 1994  
CSU Libraries Strategic Plan.

\_\_\_\_\_, "Implementation Action Items 1994-95/1995-96 for  
CSU Library Strategic Plan," January 1995.

California State University Task Force on Facility Planning for  
Library and Information Resources, "Information Resource Facilities  
for the 21st Century: A Framework for Planning," April 1996. <sup>1</sup>

California State University Task Force on Library Collections,  
"Report of the Task Force on Library Collections," August 1998. <sup>1</sup>

Consortium for Educational Technology for University Systems  
(CETUS), "The Academic Library in the Information Age:  
Changing Roles," CETUS Discussion Series, 1995. <sup>2</sup>

\_\_\_\_\_, "Fair Use of Copyrighted Works," CETUS Discussion  
Series, 1995. <sup>2</sup>

\_\_\_\_\_, "Information Resources and Library Services for Distance  
Learners: A Framework for Quality," CETUS Discussion Series,  
1995. <sup>2</sup>



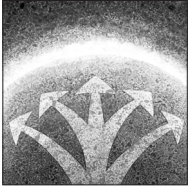
## Appendix A

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\_\_\_\_\_, "Ownership of New Works at the University: Unbundling of Rights and the Pursuit of Higher Learning," CETUS Discussion Series, 1995. <sup>2</sup>

<sup>1</sup>Available on the Web at <http://www.calstate.edu/tier3/SLI/>

<sup>2</sup>Available on the Web at <http://www.cetus.org>



## Appendix B

### *Participants*

Members of the Council of  
Library Directors (COLD)

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**CSU Bakersfield**

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**CSU Hayward**

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University Librarian  
**Humboldt State University**

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**CSU Los Angeles**

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Bill Robnett  
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**CSU Monterey Bay**

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**CSU Northridge**

Harold Schleifer  
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**CSPU Pomona**

Patricia Larsen  
Dean & Director of the Library  
**CSU Sacramento**

Johnnie Ann Ralph  
University Librarian  
**CSU San Bernardino**



## Appendix B

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Deans of Continuing/  
Extended Education

Vice Presidents/Provosts,  
Academic Affairs

***CSU Project Manager***

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Director  
Systemwide Library Initiatives  
Office of the Chancellor

Faculty and student focus  
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Cal Poly Pomona  
CSU Chico  
CSU Dominguez Hills  
CSU Fresno  
CSU Fullerton  
CSU Los Angeles  
CSU Long Beach  
CSU Monterey Bay  
CSU Northridge  
CSU San Bernardino  
CSU San Marcos  
Humboldt State University  
San Diego State University  
San Francisco State University

***Focus and Interview Groups***

Executive Council Technology  
Steering Committee

Commission on Learning  
Resources and Instructional  
Technology

Statewide Academic Senate,  
Academic Affairs Committee



### *Systemwide Administration*

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Richard West  
Executive Vice Chancellor, Business and Finance

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