

Veritable and Virtual Library Support for Graduate Distance Education in America's New Public University

by

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"America's New Public University" is a key phrase in the planning of Indiana University's future, a future that promises a new role for Indiana University Libraries. As *The Strategic Directions Charter: Becoming America's New Public University* states:

The phrase, "America's New Public University," evokes our responsibilities for the future, with their inherent goals and values. The meaning of three of the words in this phrase are clear. "America": our history and character are American, grounded in traditions of American universities as learning communities in which knowledge is discovered and conveyed in order to enlarge the culture and enlighten the citizens of a democracy. "Public" denotes that we reaffirm our obligations to Indiana citizens and our role as a port of entry to a high quality of life for a widely diverse population; access, respect, and opportunity for all are among our chief commitments. "University": we are a university not only because the curricula of each of our campuses enable students to study in one of several disciplines and professions and to make connections among them, but also because we are a single institution geographically distributed — a single university composed of campuses with complementary missions.¹

As both an American university dedicated to serve its nation's citizens and as a public university committed to access and opportunity, Indiana University (IU) is seeking new directions in which to explore new relationships with its constituencies. Those constituencies include working adults who seek lifelong learning. Because lifelong learning is a goal supported by all Indiana libraries, understanding the goals of America's New Public University is important. But, this understanding is especially important to those librarians who will be

providing library services to adults participating in IU's initiatives in distance education. Of these adults, the group with needs not likely to be met through present networks of library service are those who will enroll in graduate distance education programs.

From Plan to Precedent

In America's New Public University, many working adults who want to pursue an advanced degree would do so free from the constraints of lock-step curricula designed for full-time residential graduate students. These non-traditional graduate students would have a choice of off-campus graduate and professional degree courses delivered through distance education technologies as well as through short-term intensive residencies held on one or more IU campuses. These increased opportunities for advanced study for placebound adults arise from initiatives outlined in *The Strategic Directions Charter: Becoming America's New Public University*. While this charter issues the broad mandate to "increase access to the university through non-traditional programs and courses,"² detailed responses indicating new initiatives for access that could be created can be found in the individual task force reports available on the Strategic Directions World Wide Web homepage (<http://www.iupui.edu/it/stratdir/home.html>). Funding for these IU initiatives will be available from approximately \$15 million to be allocated over the next three years. (The allocation timeline and process are detailed in the Request for Proposals.³)

For IU librarians, the most significant statements of these new initiatives come from Task Force I, the Task Force for University and Campus-Wide Missions which recommends that:

The Graduate School and units that offer graduate programs should have processes in place to insure that those programs are in touch with and responsive to societal needs and demands with regard to the training and employment of high-level professionals.⁴

The Task Force I Subcommittee A report further delineates the constituencies of graduate students to whom the various campuses should be responsive:

The Bloomington and Indianapolis campuses should continue to be the focus of doctoral-level education. The other campuses should focus on development of master's programs that meet regional needs. At the same time, the university should take steps to identify and respond to needs for post-master's study on the part of people throughout the state who are placebound. An approach that makes use of distance education

technology and of the talents of regional campus faculty members would allow IU to address these needs while not diluting existing graduate or undergraduate programs.⁵

The role of the IU Libraries in creating these avenues of access to placebound graduate students has yet to be determined. But, "placebound constituents" will necessarily rely on remote access to on-line library resources. As Patricia Steele, Acting Dean of IU Libraries, asserts, "library and information support are critical to equitable and workable distance education programs,"⁶ and as they currently are demonstrating through their own initiatives to improve remote access, librarians can effectively use technology not only to enhance access but also to deliver instruction and reference support.

The Walden University-Indiana University Bloomington Libraries Model

Indiana University Libraries (IUL) is critically situated to provide leadership to further the mission of lifelong learning as described by one of the eight Strategic Directions Committee task forces, the IU Task Force on Campus and University-Wide Missions:

We see all education as a seamless web across time and distance. Consequently, we want to minimize highlighting differences between levels and direct the University's thinking to that of participating in the lifelong learning experiences of our constituents, albeit differently at different phases and for different constituencies.⁷

Providing library services to these constituencies — some of whom will be working adults seeking a graduate degree program that will allow them to maintain career, family, and community commitments — poses organizational, financial, and logistical challenges. But these challenges need not discourage librarians from taking the lead in creating America's New Public University. Indeed, many of these challenges are currently being met individually by IU librarians. There is, additionally, one program that has faced and met all of these challenges, and its experience can be a useful guide to offering distance education library services.

A program of library services to support distance education for graduate students has been under development at the IU Bloomington (IUB) Libraries Access Services Department since 1993. Through an agreement between IUB Libraries and Walden University, a North Central Association accredited institution that offers doctoral degrees for working professionals, a program of

library services has been developed and implemented by the library with full-funding by Walden University. Walden University and IUB Libraries at first wrote the inter-institutional agreement to cover only the provision of library services to Walden University students and faculty during their summer residence on the IUB campus. Since 1993, however, the agreement has been extended to provide year-round library services to more than 900 students and faculty as well as summer session services to 340 students. These services are provided through the Walden University Library Liaison's office located on the IUB campus. The evolving inter-institutional agreement reflects the increased scope and costs of the library services program as it has grown over the past four years.⁸ It also reflects the successful partnership between two institutions to achieve a common goal: developing the capacity to provide library services to graduate students at a distance as well as in intensive residencies.

Veritable Libraries, Virtual Libraries, and the Universities' Missions

The converging missions of two institutions has led to a better understanding of the information needs of adult learners, as well as to an appreciation of the advantages of mixing face-to-face workshops in information literacy presented at short term residencies with on-line workshops delivered through distance education technologies. To achieve this mix of dispersed residency and distance education, Walden University requires its students to attend one three-week summer session on the IUB campus during the first year of their study and then to attend one five-day intensive seminar each year (these are offered at various conference sites around the country). This first curriculum requirement creates the need for the Walden University Library Liaison to transform an IUB residence hall library into a mini research library for each three-week summer session. The second curriculum requirement has led to the transformation of an office on the sixth floor of the IUB Main Library into a virtual library equipped with two computers with ethernet Internet access, fax, toll-free phone, and local phone, supported by the IUB Libraries document delivery system.

The veritable (true or physical) library for intensive on-site summer sessions and the virtual library to support extensive off-site independent study are both created within the present IU Libraries information environment. Thus, the Walden University-IUB Libraries model can provide useful insights into ways in which, under the terms of *The Strategic Directions Charter*, other libraries could create an integration of the delivery of and access to research resources for working adults pursuing advanced degrees. Additionally, the description of the evolving budget for the model provides an example by which

new distance education strategies can be developed by IU Libraries on a cost-recovery basis that will avoid placing undue burdens on present budgets.⁹

Some librarians have expressed concern that institutions with distance education programs benefit from the services, resources, and staff of other institutions without acknowledging or compensating them.¹⁰ Such is not the case under the Walden University-IUB Libraries agreement. The memorandum of understanding which outlines the terms of the agreement, ensures that there will be the "equitable and satisfactory enumeration" for the contributions of IUB Libraries, a key criteria for successful inter-institutional cooperation.¹¹ Walden University funds the entire cost of the services offered through the Walden University Library Liaison office, with the exception of charges to individual students for their use of the fee-based document delivery services from IUB Libraries.

Funding Library Services to Placebound Graduate Students in America's New Public University

Similar funding arrangements could be reached between the IU units offering graduate distance education programs and the IU libraries providing services through the negotiation of intra-institutional agreements. These intra-institutional agreements could be funded through a process outlined in the Request for Proposals (RFP) section of the Strategic Directions Initiatives on the Strategic Directions home page.¹² The RFP process includes developing a budget proposal, and that first requires the identification of graduate distance education library services that would need to be funded. The services listed below in the descriptions of the "veritable" and "virtual" libraries provide many of the details upon which an RFP budget can be based. Such cost-recovery based partnerships would fall within strategic directions for the libraries:

The libraries must be responsible and accountable for resources under the libraries' control and must have an active and effective assessment plan. We must seek efficiencies through job sharing, out-sourcing, and other methods and must look for avenues to increase revenues. The development of appropriate fee-based services can be a part of the strategy.¹³

But the recovery of costs would not be the only criteria for developing such an internal partnership. Cooperation with units offering graduate education programs should also bring the library into closer contact with other potential partners. Identifying new partners is clearly a strategy for more closely orienting the library to the information needs of the public: "Through our partner-

ships, we will share our intellectual resources with external constituencies and collect valuable information on the needs of schools, businesses, non-profit organizations, government agencies, and Indiana citizens.”¹⁴ Thus internal partnerships could lead to external partnerships and enable the library to expand its public role as a source of instruction as well as a resource for instruction. In this way, the strategy of creating intra-institutional agreements would offer an opportunity for inter-institutional cooperation.

To further effect cost-recovery partnerships, IU librarians also ought to be involved in tuition reform initiatives that place value on individual elements of distance education. The strategic plan for any IU library seeking to develop an intra-institutional agreement would need to include active participation in goals similar to this:

We will undertake a thorough reevaluation of tuition policies to develop significantly more sophisticated pricing strategies. Our goals will be to provide greater value to student, to gain increased control of revenues, and to reach new populations of learners by offering new ways to attend the university.¹⁵

Another strategic initiative with potential for cost-recovery of distance education library services is the creation of intra-university marketing partnerships called Strategic Educational Units (SEU).

An SEU is defined by a distinctive array of offerings, a well-defined set of competitors, and distinguished capabilities and programs. For various purposes, an SEU may be identified as a school, a department, a campus, or a program whose offerings and purposes involve faculty, staff, and students from several departments, schools, or campuses.¹⁶

Participation in SEUs that encompass all of the university resources involved in offering a graduate distance education program could provide the library an opportunity to demonstrate the economic importance of an effective program of library services in attracting and retaining working adults to an advanced degree program.

“Best Practice” and the Walden University-IUB Libraries Model

The concept of “best practice” can also be used as a basis for institutional agreements between IU libraries and IU units offering distance graduate education. Unlike benchmarks, which set quality standards for products, best

practices focus on the process of achieving competitive quality.

Although benchmarks can be valuable indicators of problems, we emphasize the need to carefully dissect what is behind such data. In many cases, more can be gained by looking at "best practices." There is no need to re-invent ideas; results can be achieved by examining and adapting programs or components of processes tried and found successful by others facing similar issues.¹⁷

Fortunately, the best practices in distance education library services have been effectively identified in the professional literature. The trans-organizational system by which Walden University secures library resources through the IUB Libraries has been shaped by the "ACRL (Association of College and Research Libraries) Guidelines for Extended Campus Library Services"¹⁸ and the ARL (Association of Research Libraries) guidelines outlined in their report, "Toward a Realization of the Virtual Library,"¹⁹ both of which identify "necessary" resources and services for distance education. Additional useful suggestions about access and delivery of services were found in *A Guide for Planning Library Integration into Distance Education Programs*.²⁰ These documents provide guidelines for establishing a philosophy of service and implementing that philosophy in terms of management, financial support, facilities, access to resources, and services.²¹ As the Walden University-IUB Libraries Model demonstrates, that philosophy can be fulfilled through creative adaptation of present IU library services to achieve distance education best practices.

These standards provide best-practice guidelines for two types of distance education library services: the extended campus veritable library and the non-campus virtual library. Both types of libraries are utilized in the Walden University-IUB Libraries model.²² Examples of implementing "best practice" for each type of service are detailed below to provide an outline useful in preparing an IU intra-institutional RFP or in planning library services to support graduate distance education.

The Veritable Library and ACRL Criteria

The "ACRL Guidelines for Extended Campus Library Services" describe the various areas of activity that must be involved in planning the extended campus library veritable library. Extended campus libraries with their walled spaces and captured collections, have facility and physical needs that must be met. Meeting these needs gives rise to activities that must be included in planning. Off-campus students who are in residence for a brief time (an evening, a weekend, or a few weeks) often need customized graduate library services at a site where these services

are not usually available. To develop these customized services, planning must include all activities undertaken to bring the veritable library into existence, no matter how long or short its lifespan. While each program of library services to graduate students attending intensive residencies will be created in a unique environment, the brief description of the "Walden Library" below will suffice as an overview of activities to include in planning.

The Walden University Library

As the fabled Brigadoon magically rises out of the mist every 100 years, so the Walden University Library (WUL) materializes on the IUB campus each June. There is, however, no magic involved in transforming a residence hall library into a research library extension. The emergence of the WUL and its subsequent dismantling demand the logistical planning and support of a minor military campaign.

Included in the preparations are the 1) purchase and distribution of supplies, 2) hiring and training of staff, 3) conversion of a circulation desk into a reserves area, 4) creation of a local area network (LAN) that extends database access from the main library to WUL, 5) preparation of customized written guides to facilitate LAN use to meet curriculum requirements, 6) generation of library cards for all participants, 7) coordination of document delivery directly from IU libraries to WUL, and 8) planning and scheduling database searching workshops.

ACRL Guidelines

1) Supplies: However mundane it may seem, in the IU fiscal environment of Responsibility Center Management, all supply needs, including paper and toner cartridges, must be anticipated and provided for in the budget.

2) Staffing: Besides hiring reference assistants for WUL, provisions are made for extra reference assistants' hours in the IU Main Library and at selected branch libraries. The presence of the School of Library and Information Science on the IUB campus guarantees a plentiful pool of applicants for reference assistant positions. Coursework in database searching and an interest in working with adult learners are the primary criteria for selecting reference assistants. Paid training sessions serve to familiarize assistants with the Walden University curriculum and to impart to them a philosophy of customized service.

3) Space: The WUL is housed in the Read Hall Library, a large and well-equipped undergraduate residence hall library. Converting the library from one

geared to the needs of undergraduates to one that can serve graduate students requires clearing space for the reserves collection and setting up work tables on which to construct the temporary LAN. Coordination with Halls of Residence staff and the Halls of Residence librarian in making these physical changes is essential.

4) The LAN: The Walden University Library (WUL) houses a fourteen station CD-ROM LAN which extends the electronic resources of the IUB Main Library LAN to Read Hall. All computers are rented by Walden University; the LAN equipment is owned by WU and housed in the Walden University Library Liaison (WULL) office. IUB Library automation staff contract to provide technical support for the LAN.

5) Customized Guides: Guides prepared specifically to support the Walden University curriculum are created by the WULL for distribution to students and faculty. Customization is necessary because in intensive residencies, students don't have time to experiment to discover optimal use of appropriate resources to meet their particular research needs.

6) Library Cards: For summer session, WU students' fee-based inter-library loan (ILL) patron record is replaced with an Indiana resident-type patron record. This change allows students free circulation privileges only for the duration of the summer session, at the end of which the patron records are returned to their former ILL status.

7) Document Delivery: The IU library cards generated for summer session students permit the students to request and receive materials through the fee-based IU Bloomington Delivery Service (BDS). The photocopies and monographs are brought to WUL and arranged alphabetically on shelves near the circulation desk where students pick them up. WUL also offers a drop off service for return to the appropriate campus library.

8) Workshops: Efficient and fruitful information seeking and retrieval are the goals of workshops taught by the Walden University Library Liaison and Library Services Coordinator (LSC). Each workshop is offered on at least three different days at different times in an effort to complement rather than complicate an already full schedule of seminars and faculty workshops. In addition to the workshops, the WULL and LSC schedule database search strategy appointments with individual students.

The Virtual Library and ARL Criteria

The Walden University Library Liaison and Library Services Coordinator also staff a virtual library, run year-round from a small office in the IUB Main Library. The Walden Virtual Library consists of local IUB Library resources and the research resources available through the Walden Information Network (WIN). These resources are part of a "hard system" of network and telecommunications (phone and fax) connections which support the essential "soft system" of librarians, students, faculty, and staff relationships. The transactions that form these human relationships are the real substance of the virtual library. "Best practice" for this virtual library involves identifying systems' processes that effectively support these essential transactions.

Other examples of virtual library "best practice" focus only on well-wrought hard systems connections. One scenario for the ultimate virtual library depicts immediate workstation access to the universe of knowledge and immediate or next-day delivery of the desired documents or books — for a fee.²³ It is a system which requires the integration of sophisticated Online Public Access Catalogs (OPACs), article indexes, and accounting systems with on-line request processing and fulfillment. While some books and some documents are accessible in this way, we are far from achieving universal availability; it is a tantalizing but presently unrealistic "best practice" against which to measure virtualness.

ARL Criteria for Best Practice

A more reasonable scenario is the set of activities listed in a 1992 survey of ARL libraries, a survey intended to gauge libraries' progress in realizing the virtual library. In the two-part report of their findings, the authors collapse the original fourteen questions about specific and somewhat overlapping actions into ten activity areas. According to Schiller and von Wahlde, the ten activity areas which define the essential criteria for the emerging virtual library are: 1) access over ownership, 2) strategic planning, 3) network access, 4) cooperative development of databases and hardware, 5) OPAC enhancement, 6) full-text databases, 7) electronic journals, 8) end-user searching, 9) electronic document delivery, and 10) training.²⁴

As will be evident from the following comparison of ARL criteria with Walden University Library Liaison services, the Walden University-IUB Libraries model implements the criteria in ways unique to a relationship between a university without a campus or a library, and one of the most comprehensive research libraries housed on one of the largest campus library systems in North America.

ARL Criteria 1: Policies, Services, and Strategies Which Emphasize Access Over Ownership

Since Walden University (WU) has no collection, access to other resources is its only alternative. Fortunately, IUB Libraries collections complement the WU curriculum. Students have free access to the IUB Libraries collection while on campus for summer session, but pay \$10 per book or photocopy for home delivery at all other times.

ARL Criteria 2: Strategic Planning

The WU-IUB Libraries planning process includes frequent planned as well as spontaneous discussions held at both the institutional and at the inter-institutional levels. Formal participation by the Walden University Library Liaison (WULL) at the institutional level includes weekly conference calls with members of Walden University's Office of Academic Affairs and weekly meetings with the IUB Libraries Access Services Management Team.

ARL Criteria 3: Network Access

Walden University students have access to the Walden Information Network (WIN) from their home computers; e-mail accounts afford speedy communication between students and the WULL. A research resource gopher is available for each of the doctoral degree areas (education, health services, human services, and administration/management). World Wide Web (WWW) access is also available through the Lynx browser.

ARL Criteria 4: Cooperative Development of Databases and Hardware

The Walden University Library Liaison is consulted by the WU Executive Director of Technology in the planning for and selection of electronic research resources to be made available to students through the Walden Information Network, but all hardware and database access is maintained by Walden University.

ARL Criteria 5: OPAC Enhancements

The gopher and WWW links to IU's online catalog are available to WU students through the Walden Information Network menu. In addition, the catalog allows them to browse the on-line catalogs of Big Ten and other major universities. However, Walden University is not involved in the IU Libraries OPAC developments.

ARL Criteria 6: Full-Text Databases

Walden University students currently do not have access to full-text databases, except those available through WWW links. WU students only have guest access to IU Libraries resources.

ARL Criteria 7: Electronic Journals

Although Walden University does not subscribe to any electronic journals, the Walden Information Network offers students access to several publications that are available through WWW links.

ARL Criteria 8: End-User Searching

The Walden Information Network provides remote access to databases through the *Silverplatter Electronic Resources Library* and *CARL UnCover*. The WULL and the Library Services Coordinator facilitate end-user searching by developing search guides and conducting on-line search workshops as well as by responding to numerous queries from faculty and students. In addition, international students and some rural students without Internet access continue to be dependent on the WULL to conduct database searches for them. Although the number of searches requested by students is expected to drop as Internet access becomes more widely available, the WULL will continue to conduct searches for students who need assistance, a task which has been described as a "cornerstone" of off-campus library service.²⁵

ARL Criteria 9: Electronic and Print Document Delivery

IUB Libraries provides a fee-based document delivery service (DDS) for both books and photocopies of journal articles under the terms of the agreement with Walden University. WU also agrees to reimburse IUB Libraries for any unpaid delivery charges or lost books. Students have interlibrary loan privileges (forty days) for any circulating item housed on the Bloomington campus; they are charged \$10 per item. Students are also charged \$10 for each photocopied journal article. Photocopies and books are mailed to a student's home address. A library user number is necessary for ordering materials through DDS, thus, an inter-library loan card is generated for each student.

Electronic document delivery is provided through Walden University's gateway to *CARL UnCover's* database.

ARL Criteria 10: Training

A Walden Information Network (WIN) User's Guide is mailed to all students; the library section of the guide includes instructions for accessing and

searching the databases available on the WIN.

Bibliographic instruction is provided through on-line workshops and in correspondence with students who have requests regarding government documents and other specific kinds of literature.

Conclusion

In their focus on lifelong learning, both Walden University and America's New Public University share a common goal: to meet the needs of placebound graduate students who are "unable or unwilling to participate in a mainstream program at a post-secondary institution but who prefer to pace their study around their normal activities and restrictions."²⁶ In light of this common goal, the Walden University-IUB Libraries Model can serve as a useful blueprint for IU librarians whose new mission will be supporting distance graduate education.

End Notes

1. Strategic Directions Steering Committee
2. *ibid*
3. Strategic Directions Initiatives Committee
4. Task Force for Campus and University-Wide Missions, Report
5. Task Force for Campus and University-Wide Missions Subcommittee A
6. Steele
7. Task Force on Campus and University-Wide Missions, Report
8. Weaver and Shaffer
9. *ibid*
10. Aguilar and Kascus
11. Garten and Hartwell
12. Strategic Directions Initiatives Committee
13. Steele
14. Strategic Directions Steering Committee
15. *ibid*
16. *ibid*
17. Task Force for Operational Efficiency and Revenue Enhancement
18. Association of College and Research Libraries Task Force to Review the Guidelines for Extended-Campus Library Services

19. Schiller and Von Wahlde
20. York
21. Association of College and Research Libraries Task Force to Review the Guidelines for Extended-Campus Library Services
22. Weaver and Shaffer
23. Getz
24. Schiller and Von Wahlde
25. Slade. "Thirteen Ingredients in Off-Campus Library Services: A Canadian Perspective"
26. Slade. "Library Services for Distance Education Courses"

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384 Mr. President, Mr. Chairman, I would like to thank you for the opportunity to speak today. The role of the library in the modern library setting is a critical one. In the past, libraries have been seen as repositories of information, but in the modern setting, they are becoming more and more active in the community. This is a result of the changing needs of the community and the changing role of the library. The library is now seen as a place where people can go to get help, to get information, and to get involved in the community. This is a role that is becoming increasingly important in our society. The library is a place where people can go to get help, to get information, and to get involved in the community. This is a role that is becoming increasingly important in our society. The library is a place where people can go to get help, to get information, and to get involved in the community. This is a role that is becoming increasingly important in our society.