

## **Recommendations of the Executive Committee for financial changes to strengthen CARLI**

### **Background**

CARLI libraries pay part of the cost for some of the membership benefits that they currently receive. I-Share participants are assessed to recover identified software, hardware, and maintenance costs, and *Chronicle of Higher Education* subscribers pay a portion of the annual cost of the product. Extending cost-sharing uniformly and consistently to the consortium's services and programs strengthens CARLI in several ways.

- Cost-sharing encourages libraries to select the services most important to their individual libraries.
- Cost-sharing improves CARLI's cost effectiveness by only paying for services and content that are needed and explicitly chosen by one or more member libraries.
- Cost-sharing enhances our partnership with members. CARLI invests in members, when the members invest in CARLI.
- Cost-sharing strengthens CARLI's flexibility to react more nimbly to future price/budget changes.

Effective cost-share pricing is connected to membership and governance. The following recommendations are predicated on these assumptions:

- CARLI will use consortial funding cost effectively and to obtain the greatest collective benefit.
- CARLI will revise its membership categories, making clear and consistent distinctions between categories.
- CARLI will limit participation in premium programs and services and access to most content resources to Governing members.
- Members will be expected to share the cost of CARLI programs and services that the library uses.
- Electronic resources brokered (subscribers pay the entire cost of the resource) by CARLI are not subject to cost sharing, as described here.
- Continuation of any fully subsidized resource is predicated on the levels of funding by the state and the overall cost of the product. Should member cost sharing be required, CARLI will endeavor to make it affordable for all members.

### **Recommendations:**

1. Member cost sharing will be determined for all currently offered programs and services, where CARLI currently pays the entire cost.

2. CARLI will develop cost-share pricing for any new initiatives, however, members may not be assessed when a service or program is initially implemented or when consortial funds are adequate to defray the costs.
3. CARLI should provide the current aggregated full text journal database package without cost sharing.
4. Content previously acquired and fully paid for should be provided without additional members cost sharing. This includes the *Saskia Archive*, *HarpWeek* and the *Sanborn Fire Insurance Maps for Illinois*. No new resources should be acquired without a cost sharing component.

**Products and services that would be impacted:**

SFX (link resolver)

CONTENTdm (digital object management) *Oxford English Dictionary*

MLNC dues

Health Sciences journals (replacement for Leibert)

**Products and services that could be impacted in the future**

bX – article recommender for SFX users

ILDS delivery (if state funding should falter)