

To: I-Share Library Directors

From: Bernie Sloan

Subject: FY 2008 I-Share Assessments

Date: June 12, 2006

The CARLI Board of Directors has approved I-Share assessments for FY 2008 (FY 2007 assessments were approved in April 2005).

The I-Share assessment fee is a fee paid by all I-Share libraries to help offset the costs of maintaining the system on an ongoing basis. Prior to the establishment of CARLI, the I-Share assessments were known as ILCSO Membership Assessments. ILCSO member libraries began paying these fees in FY 1988.

The I-Share Assessment Working Group developed the recommendation that was approved by the CARLI Board. The Working Group was comprised of the following representatives from I-Share member libraries:

- Diane Dates Casey, Governors State University
- Martin Gallas, Illinois College
- Chris Hoepfner, DePaul University
- Jay Lambrecht, University of Illinois at Chicago
- Pat Woodworth, John Wood Community College

The institutional I-Share assessments reflected in the attached spreadsheet were developed using the following basic rules.

1. Increase the bottom line total assessment by 2% from FY 2007 to FY 2008.
2. Apportion the new bottom line total among the 65 I-Share libraries using the basic weighted formula used to calculate the FY 2007 assessments:
 - a. 50% proportional use of Voyager (use that originated from your library's patrons only)
 - b. 40% proportional bib record count
 - c. 10% proportional student FTE counts
3. Increase minimum assessments to \$6,000. The minimum assessments are established to ensure that every library is committing some fixed minimum level of support for I-Share. If a given library's assessment does not reach the minimum level after initial calculations, the assessment is raised to the minimum. In past years the Higher Education Price Index (HEPI) has been used to determine the amount of increases to the minimum assessments. Applying the most recent percentage change in the HEPI raised the FY 2007 minimum from \$5,800 to \$6,000 for FY 2008.

4. Apply limits to assessment increases/decreases. Upon reviewing the Working Group's proposal, the CARLI Board decided to add a limit to the size of any individual institution's increase or decrease. No institution's assessment will increase or decrease by more than 5%

The attached spreadsheet shows the effects of this model on the 65 I-Share libraries. In summary:

- The final assessment total is \$913,154, a 2% increase over FY 2007.
- 38 libraries will be assessed at the minimum level of \$6,000.
- 6 libraries will have decreases in their FY 2008 assessments, with two of those libraries capped at the 5% limit.
- 50 libraries will have assessment increases for FY 2008, including the 38 libraries that are assessed at the minimum level. Five libraries will have their increases capped at the 5% maximum.

Please feel free to contact me with any questions (bernies@uillinois.edu or 217-333-4895).