CARLI

NEW DIRECTORS INSTITUTE

May 4, 2017

CARLI is a membership organization representing 134 academic and research libraries in Illinois

Formed in 2005

Three organizations came together!

ILCSO, CCMP and IDAL

Consortium of Academic and Research Libraries in Illinois

134 member libraries

- Governing members: 128
  - Public schools: 13
  - Community colleges: 39
  - Private universities & specialized: 76
- Affiliate members (private institutions): 6

CARLI member libraries serve 90% of Illinois higher education students, faculty and staff.

- Governing membership FTE: 556,917
- Faculty and staff: <u>177,266</u>
  734,183

Governing members:

- Annual membership fees range from a minimum of $1,655 to a maximum of $11,038

- Not-for-profit institutions

- Vote for board members

- Eligible for all services

- Staff may serve on committees

Affiliate members:

- Annual membership fee is $573

- Eligible to participate in CARLI email discussion lists

- May attend CARLI workshops, training events and forums

Two UIUC library students stand just outside of the Library School Library, holding stacks of books.

The Consortium leads Illinois academic libraries to create and sustain a rich, supportive, and diverse knowledge environment that furthers teaching, learning, and research through the sharing of collections, expertise, and programs.

Oakton Community College

WHY?

- The consortium is stronger when all libraries leverage their strength…

- Only you can shape CARLI

- It's your responsibility to be part of the organization (we are YOU!)

- Get inspired

- Learn about other schools' students (they may be yours someday)

- We need you!

Board Committees
- Executive Committee
- Finance Committee
- Personnel Committee
- Program Planning Committee

CARLI Standing Committees
- Collection Management Committee
- Commercial Products Committee
- Created Content Committee
- Instruction Committee
- Preservation Committee
- Public Services Committee
- Resource Sharing Committee
- SFX System Committee
- Technical Services Committee

Task Forces
- I-Share Next Task Force

GET INVOLVED

CARLI'S FY2017 BOARD OF DIRECTORS

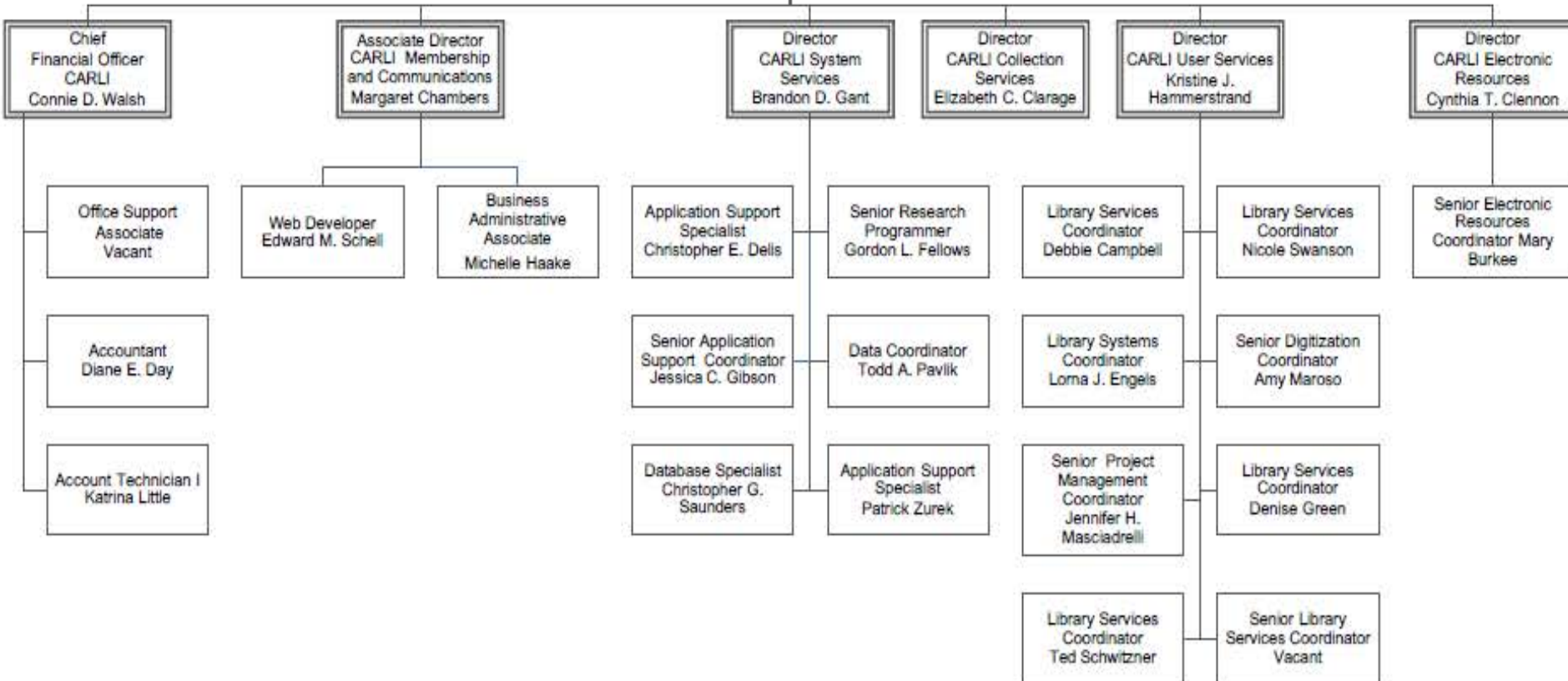| Name	Constituency	Term	Institution
Anne Craig	Ex Officio		CARLI
Jim Cubit	Private Institutions	2016-2017	Lake Forest College
Richard Darga CHAIR ELECT	Public Universities	2014-2017	Chicago State University
Cindy Fuller	Private Institutions	2016-2019	Millikin University
Cate Kaufman	Community Colleges	2016-2019	Illinois Central College
Dennis Krieb CHAIR	Community Colleges	2015-2018	Lewis and Clark Community College
Tammy Kuhn-Schnell	Community Colleges	2014-2017	Lincoln Land Community College
Felice Maciejewski PAST CHAIR	Private Institutions	2014-2017	Dominican University
Greg McCormick	Ex Officio	2016-2019	Illinois State Library
Lydia Morrow Ruetten	Public Universities	2016-2019	Governors State University
David Stern	Private Institutions	2015-2018	Saint Xavier University
Dane Ward	Public Universities	2016-2017	Illinois State University
Frances Whaley	Community Colleges	2016-2017	Illinois Valley Community College
John Wilkin	Public Universities	2015-2018	University of Illinois at Urbana-Champaign

CARLI is a unit of System Offices under Executive Vice President and Vice President for Academic Affairs, Dr. Barbara Wilson

- CARLI employees are University of Illinois employees

- University of Illinois provides:
  - Staff salaries, benefits
  - HR and legal counsel support
  - Purchasing, licensing and contracting support
  - Desktop computer support and network services

- CARLI is bound by the rules and regulations of the University as a state funded institution
  - Purchasing, procurement and auditing
  - Competitive bidding
  - Recruitment and personnel policies

![CARLI — Consortium of Academic and Research Libraries in Illinois logo]

25 employees

Senior Director
Anne Craig

Chief Financial Officer CARLI
Connie D. Walsh

Associate Director CARLI Membership and Communications
Margaret Chambers

Director CARLI System Services
Brandon D. Gant

Director CARLI Collection Services
Elizabeth C. Clarage

Director CARLI User Services
Kristine J. Hammerstrand

Director CARLI Electronic Resources
Cynthia T. Clennon

Office Support Associate
Vacant

Accountant
Diane E. Day

Account Technician I
Katrina Little

Web Developer
Edward M. Schell

Business Administrative Associate
Michelle Haake

Application Support Specialist
Christopher E. Delis

Senior Application Support Coordinator
Jessica C. Gibson

Database Specialist
Christopher G. Saunders

Senior Research Programmer
Gordon L. Fellows

Data Coordinator
Todd A. Pavlik

Application Support Specialist
Patrick Zurek

Library Services Coordinator
Debbie Campbell

Library Systems Coordinator
Lorna J. Engels

Senior Project Management Coordinator
Jennifer H. Masciadrelli

Library Services Coordinator
Ted Schwitzner

Library Services Coordinator
Nicole Swanson

Senior Digitization Coordinator
Amy Maroso

Library Services Coordinator
Denise Green

Senior Library Services Coordinator
Vacant

Senior Electronic Resources Coordinator Mary Burkee

- Signed a Membership Agreement with CARLI
- May have signed an I-Share Participant Institution Agreement
- May have served on the Board or CARLI committees or task forces…
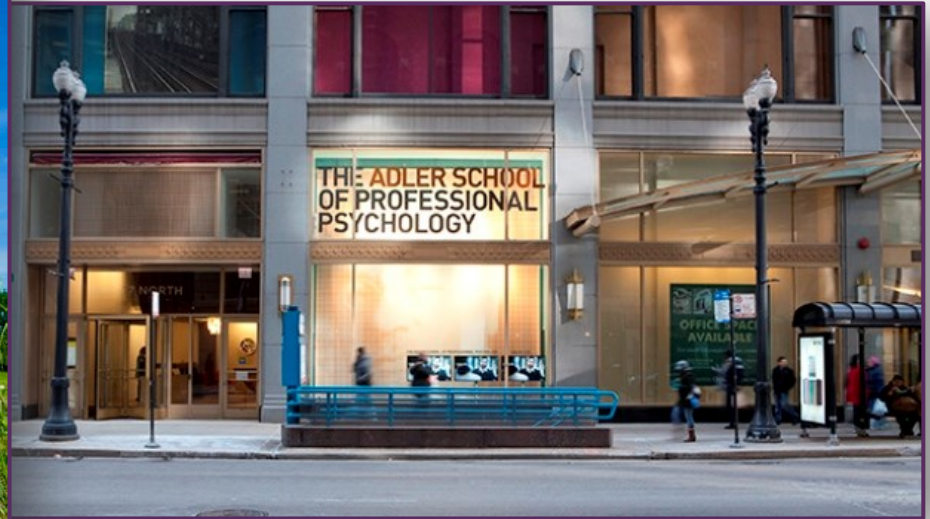
There is a history for most institutions with CARLI!

- Took place last July and August
- Helped me understand what directors value about our organization

Midwestern University

I-Share

CARLI Staff

E-resources management

Most valued for CARLI members!

THEMES THAT EMERGED

I-Share is the most valued service

- I-Share libraries could not operate an ILS for a similar cost when considering the staff, software, hardware, staff education

- Resource sharing benefits impact all Illinois residents

- The power of the shared catalog means that our faculty, staff and students can take advantage of collections throughout the state, delivered in a couple of days

- Familiarity with I-Share among the student population means that transferring students enter new schools with an advantage

Eastern Illinois University

- CARLI staff act as surrogate staff for libraries so that they can focus on supporting their users and collections.

- CARLI staff perform highly specialized and time-intensive work like managing online catalogs or contract negotiations for e-resources so that these functions need not be replicated in full at libraries.

- *CARLI frees dollars within each member organization to do mission-critical work.*

Holman Library, McKendree University

The e-resources brokering service is extremely valuable!

- The substantial bargaining power of 128 Governing libraries

- Centrally negotiated and managed license agreements

- Single consolidated invoice for multiple subscriptions

- Multi-year agreements, which give libraries greater cost predictability

- Discounts of at least a 10% discount (usually much greater)

- Capped annual price increases--an average of 5%, which is extremely rare for e-resources

- Libraries LOVE the selection system!

- The leveraging of dollars locally is tremendously important

- I-Share members can spend their budgets more strategically

Lincoln College

Prairie State College

"The relatively modest investment the State of Illinois and members make impacts *millions* statewide."

"We need a healthy CARLI in order to stay vibrant locally: CARLI's success is inseparable from my library's success!"

"Our library's staff is as lean as it can be. CARLI staff make the difference!"

"We are all one CARLI library!"

"CARLI has tremendous potential to coordinate strategic best practices."

Trinity Christian College

And finally…

"The value of colleagues working together—community colleges, private institutions, public institutions, small and large—is that the collaboration makes so many projects possible and gives us a springboard to shape important library services."

Trinity International University

What does CARLI do?

- Centralized automated systems
  - I-Share (Voyager integrated system)
  - SFX link resolver
  - CARLI Digital Collections
- E-resources
  - Subsidized core electronic resources
  - Database brokering
  - Perpetual access acquisition (subsidized and one-time purchase)
- Training, continuing education and support for research
- Physical delivery service

- *SUPPORT YOUR LIBRARY!*

North Park University

- Online catalog and integrated library system (ILS) for 86 CARLI libraries

- More than 14.1 million unique bibliographic records

- More than 36.1 million items

- 1,726,905 items circulated in FY16

- Participating libraries share their collections

- Shared centralized integrated library system
  - Runs on hardware operated by CARLI staff
  - Shared software license (Ex Libris Voyager)
- Resource sharing
  - I-Share library patrons able to borrow from all I-Share libraries; remotely and onsite
  - 336,267 transactions among institutions FY 2016
- CARLI staff provide, implementation, help desk service, data loading and reporting services to participating libraries
- I-Share libraries collaborate to share ideas and skills

Program Purpose:

to make it possible for CARLI members to expand and enhance their library collections with both subscription and perpetual access to electronic resources in a more efficient and affordable manner

- For subscriptions and purchased resources
  - CARLI determines the level of interest among member libraries
  - Negotiates discounted pricing
  - Manages the license and invoicing functions
  - CARLI passes on 100% of the negotiated discounts to the subscribing member
- The provision of brokered and purchased E-resources is CARLI's largest and most widely used service.
  - 2 annual selection cycles: Fiscal Year (April/May) and Calendar Year (Oct/Nov)
  - 126 member libraries purchased at least one database
  - Current Subscriptions being managed by CARLI

Term	Number of Subscriptions	Dollar Value of Subscriptions
CY17	706	$ 8,095,789
FY17	3,746	$ 8,571,887
TOTAL	4,452	$16,667,676

- CARLI-supported CONTENTdm
  - 239 collections
  - Over 195,000 images and 2 terabytes of information
  - 40 institutions participate
- Digital Public Library of America (DPLA)
  - *Illinois Digital Heritage Hub*
  - Index of CARLI's and Illinois State Library's IDA digital images now, more later
- Book Digitization Initiative
  - Member of the Open Content Alliance since 2008
  - Subsidized digitization of 7,943 books, 2,770 folios and 4,618 foldouts
  - 1,891,104 pages digitized
  - 45 institutions contributed at least one collection

ILLINOIS LIBRARY DELIVERY SERVICE (ILDS)

- 141 locations with over 37,000 scheduled stops per year

- Over 2.2 million items transported in FY 2016 for an average cost of $.28 per item.

- Materials travel between any 2 ILDS participants within 24 hours statewide

- The Secretary of State/Illinois State Library provides grant funding for ILDS, with management support from CARLI

- "Help Desk" and online problem reporting/resolution
- Support for subsidized e-resources
- Centralized vendor negotiation and contracting
- Centralized database brokering
- Consolidated central billing
- Network & system administration
- Database administration
- Software development

- Data analysis and usage statistics
- Statewide physical delivery
- Digital image repository
- Training for programs and services
- Professional education opportunities for staff
- Staff development through statewide committee service
- Representation to state, regional, national, and international organizations

Chief Financial Officer Connie Walsh and her team

- Oversees CARLI budget & prepares budget documents for Board

- Facilitates procurement process for purchases and contracts

- Ensures single, consolidated invoicing for libraries and vendors

Associate Director CARLI Membership and Communications Margaret Chambers and her team

- Manages communications with CARLI membership and the CARLI Board

- Plans events such as the Annual Meeting, the Board Meetings, and the New Directors' Institute

- Manages website and email lists

Director CARLI System Services Brandon Gant and his team

- Consortial Commercial Services: Voyager/Oracle, SFX, CONTENTdm

- Consortial Open-Source Services: VuFind, eXtensible Catalog, Archon, REPOX

- Consortial Custom Services: Illinois Delivers, Web Reports, Selection System, Work Requests

- Enterprise Infrastructure: VMware, Dell, Pure Storage, QLogic, HP Networking, F5 Networks
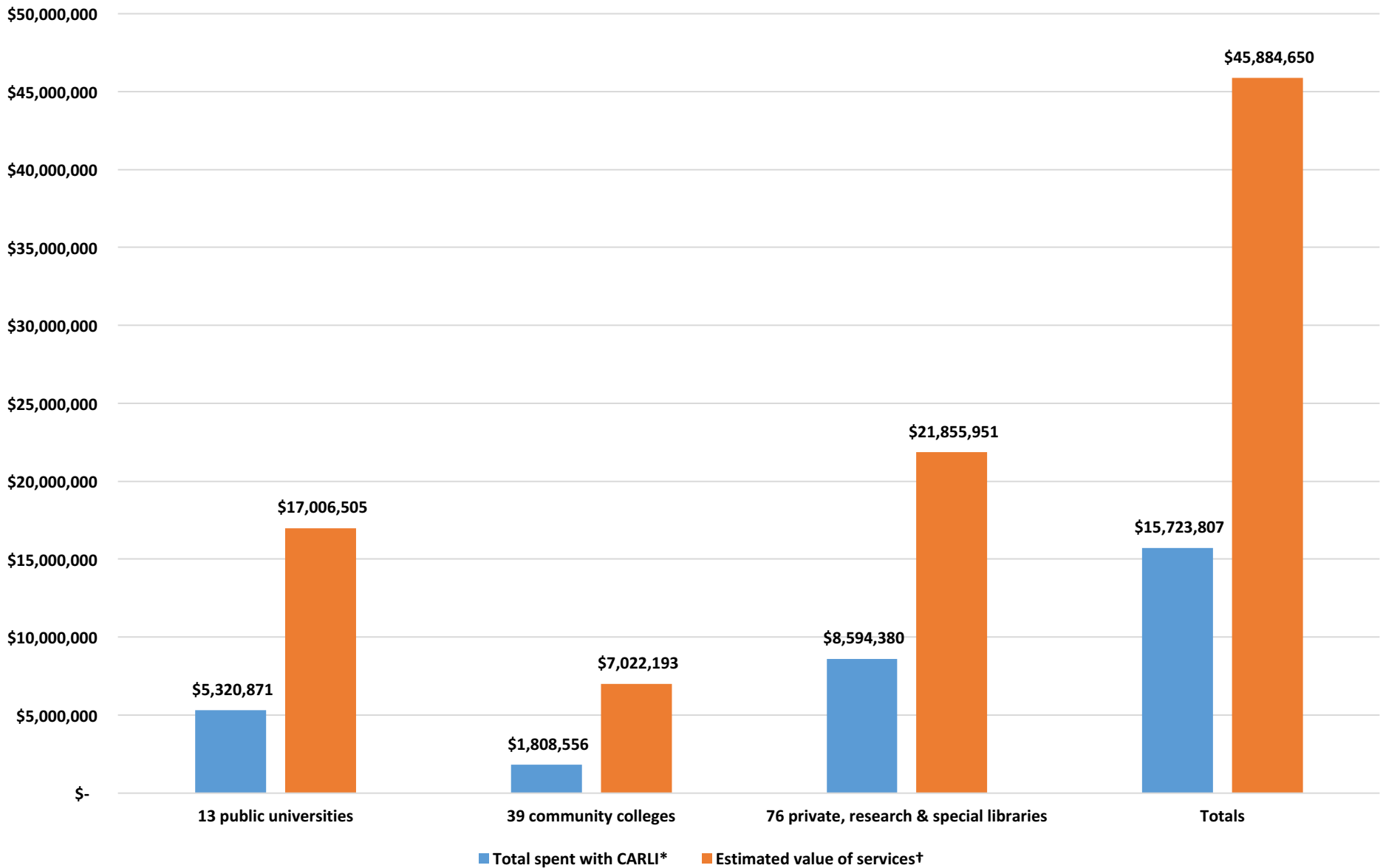
- Budget
- Strategic plan
- Search for a next-generation ILS
- Open Textbook Network collaboration
- DPLA

What is the value proposition for CARLI?

FY16 CARLI Libraries' Investments and CARLI's Value

	Total spent with CARLI*	Estimated value of services†
13 public universities	$5,320,871	$17,006,505
39 community colleges	$1,808,556	$7,022,193
76 private, research & special libraries	$8,594,380	$21,855,951
Totals	$15,723,807	$45,884,650

■ Total spent with CARLI*   ■ Estimated value of services†

*"Total spent with CARLI" includes CARLI membership fee, I-Share assessment fee (if applicable), subsidized products and services, and brokered products and services (pass-through costs).
†"Estimated value of services" includes single online catalog and enterprise system shared by 86 libraries, subsidized databases, full-price brokered databases with negotiated discounts, and staff time.

Call any of us anytime!

We are here for you!!!

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Website: http://www.carli.illinois.edu