



CARLI

ANNUAL GOVERNING DIRECTORS' MEETING
NOVEMBER 4, 2021



2021-22 CARLI BOARD OF DIRECTORS

Name	Constituency	Term	Institution
Spencer Brayton	Community Colleges	2019-2022	Waubensee Community College
Anne Craig	Ex Officio		CARLI
Rebecca Donald	Private Institutions	2021-2024	Trinity International University
Karen Janke	Private Institutions	2019-2022	Erikson Institute
Jacob Jeremiah	Community Colleges	2020-2023	Oakton Community College
Taran Ley	Public Universities	2020-2023	Southern IL Univ School of Medicine
Dallas Long	Public Universities	2021-2024	Illinois State University
Greg McCormick	Ex Officio		Illinois State Library
Matt Ostercamp	Private Institutions	2020-2023	North Park University
Pattie Piotrowski	Public Universities	2019-2022	University of Illinois Springfield
Shannon Pahrte	Community Colleges	2021-2024	Elgin Community College
John Pollitz	Public Universities	2021-2022	Southern Illinois University Carbondale
Marianne Ryan	Private Institutions	2021-2022	Loyola University Chicago
Sharon Silverman	Community Colleges	2021-2022	City Colleges of Chicago

Sarah M. Zehr, PhD

Assistant Vice President for Academic Affairs

Office of the Executive Vice President/Vice President for
Academic Affairs

University of Illinois System

CARLI'S STRATEGIC PRIORITIES



Ensure adequate, secure, and stable funding for CARLI



Members:

- Fred Barnhart, Northern Illinois University
- Karen Janke, Erikson Institute
- Jacob Jeremiah, Oakton Community College
- Tammy Kuhn-Schnell, Lincoln Land Community College
- Dennis McGuire, Columbia College Chicago
- Thomas Teper, University of Illinois Urbana-Champaign

CARLI Staff:

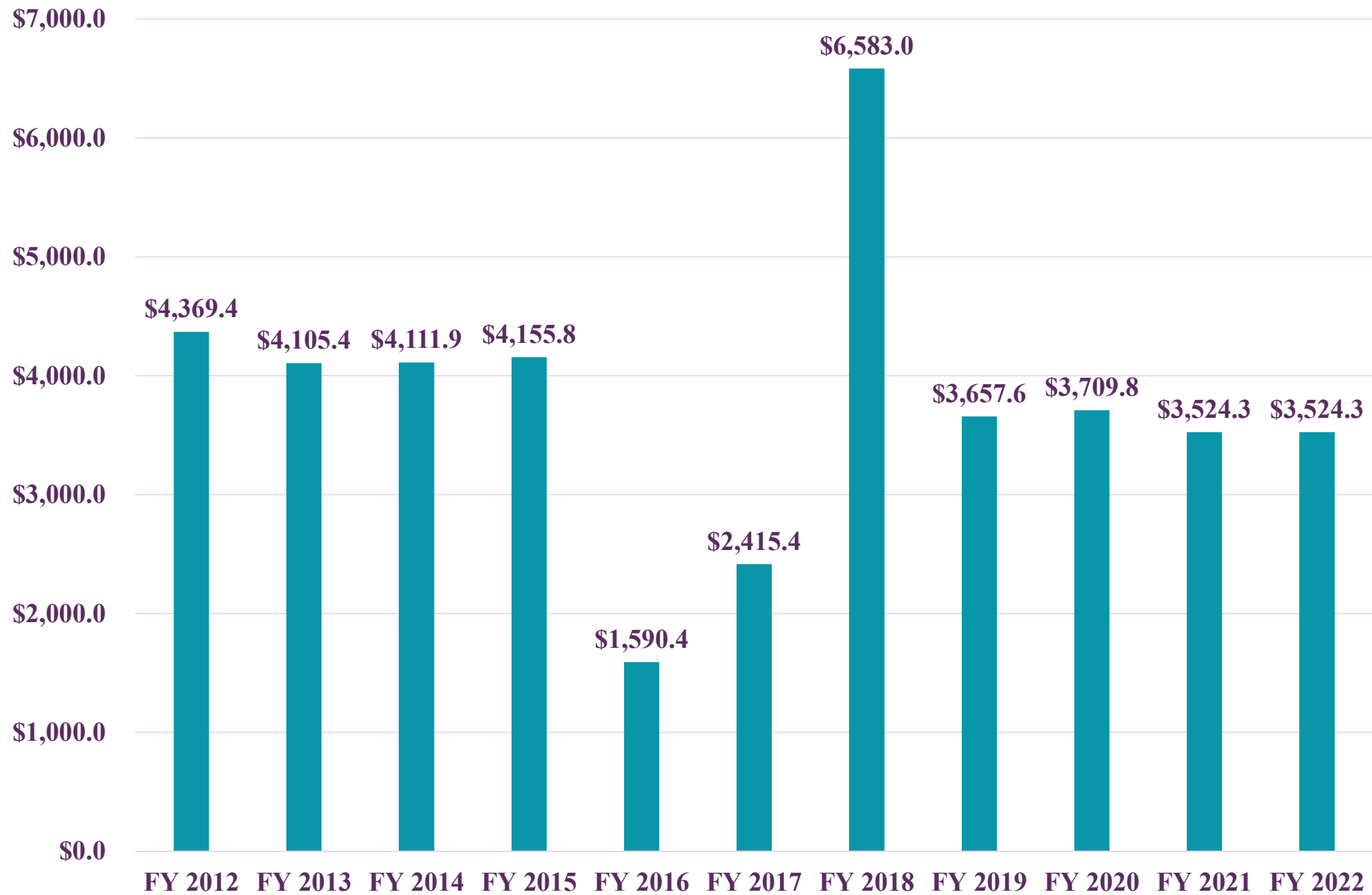
- Margaret Chambers
- Anne Craig
- Timothy David
- Diane Day
- Kristine Hammerstrand

CARLI REVENUE SOURCES FY22

	FY2021	FY2022	change	
University of Illinois (Allocation from State of IL appropriation)	\$3,524,292	\$3,524,292	\$0	0%
Membership Fees	\$402,613	\$465,525	\$62,912	15.6%
I-Share Assessments	\$1,785,312	\$1,838,848	\$53,536	3%

Pass-through revenue	FY2021	FY2022	change	
Subscriptions to databases <i>estimated for FY22</i>	\$14,400,698	\$14,000,000	\$(400,698)	-3%
ILDS (Illinois Library Delivery Service) grant (IL State Library) <i>estimated for FY22</i>	\$856,000	\$902,420	\$46,420	5.4%

CARLI STATE FUNDING ALLOCATIONS FY12-FY22



Enhance collaboration among libraries by identifying, nurturing, and supporting services and programs that can best be provided at scale

Provide resources/services/tools for discovering and optimizing information resources and collections



OPEN ILLINOIS

*An initiative of the Consortium of Academic
and Research Libraries in Illinois*

Open Illinois = All things CARLI and OER

- “Illinois SCOERs: Support for the Creation of Open Educational Resources,” US Department of Education Open Textbooks Pilot Grant
- CARLI OER Commons Hub
- CARLI’s Open Education Network membership
- OER Committee activities
- Education and information

<https://www.carli.illinois.edu/products-services/collections-management/open-ed-resource-overview>

Illinois SCOERs: Support for Creation of Open Educational Resources

<https://www.carli.illinois.edu/products-services/collections-management/IllinoisSCOERs>

- **\$1.08 million, three-year grant from the US Department of Education**
- Michele Leigh, Project Director, hired October 4
- Competitive sub-awards will be available in subjects in the focus area: “The Human Condition: Care, Development, and Lifespan”
- Applications available after December 1
- A minimum of eight OER textbooks/ancillary materials will be developed for introductory classes
- **\$25,000 grant from Illinois Secretary of State for 3D printers**
- Join our email list! <https://lists.carli.illinois.edu/cgi-bin/mailman/listinfo/il-scoers>



- Launched September 2021
- A customized, branded space on OER Commons - a digital library and collaborative platform
- Showcases OER resources from CARLI Member and other Illinois stakeholders into a publicly accessible location to find OER created and used within the state.
- Governing members may have a presence on the Open Illinois Hub by submitting a form from the CARLI website: <https://www.carli.illinois.edu/products-services/oer-commons>
- Thank you to Anne Chernaik, Dan Matthews, and the OER Committee for their help in the hub design and implementation.

DISTINGUISHED EMPLOYEE LEADERSHIP AND TEAM AWARD (DELTA)

- Demonstrates and models attributes of successful high performing project teams.
- Provides value added results.
- Communicates and manages expectations around project timing and expected results.
- Engages stakeholders in their sponsorship role to provide the resources (talent, tools, and facilities) to complete the project team engagement.
- Delivers results that at minimum meet and potentially exceed expectations.





CARLI I-Share Migration Team

- Deborah Campbell
- Christopher Delis
- Gordon Fellows
- Jessica Gibson
- Denise Green
- Kristine Hammerstrand
- Amy Maroso
- Jennifer Masciadrelli
- Todd Pavlik
- Christopher Saunders
- Theodore Schwitzner
- Nicole Swanson
- Bradley Woodruff

Anne Craig, Senior Director

Open Illinois

- Michele Leigh, Senior Coordinator, Open Illinois

MEMBERSHIP AND COMMUNICATIONS

Margaret Chambers, Director, Membership and Communication

- Michelle Haake, Senior Coordinator Membership & Communications
- Ed Schell, Web Developer
- Nicole Swanson, Senior Coordinator, Library Services and Outreach

BUSINESS AND FINANCE SERVICES

Diane Day, Fiscal Officer

- Tim David, Delivery Program Administrator/Accountant I
- Katrina Little, Accounting Associate

COLLECTIONS SERVICES

Elizabeth Clarage, Director, Collections Services

Jenny Taylor, Assistant Director, Electronic Resources

- Nicole Ream-Sotomayor, Senior Electronic Resources Coordinator
- Denise Green, Senior Library Services Coordinator

SYSTEMS SERVICES

Gordon Fellows, Assistant Director, System Services

- Chris Delis, Application Support Specialist
- Jessica Gibson, Senior Application Support Coordinator
- Todd Pavlik, Data Coordinator
- Chris Saunders, Database Specialist
- Bradley Woodruff, Library Application Support Consultant

USER SERVICES

Kristine Hammerstrand, Director, User Services

- Debbie Campbell, Senior Library Services Coordinator
- Amy Maroso, Senior Digitization Coordinator
- Jennifer Masciadrelli, Senior Project Management Coordinator
- Adrienne Radzvickas, Library Services Coordinator
- Ted Schwitzner, Senior Library Services Coordinator

WILEY/OXFORD EBOOK PROJECT: FUNDING AND ACCESS

	FY21	FY22	FY23
<p>Three-year project funded by</p>	<p>CARLI consortial funds (\$760,000)</p>	<p>Grant plus crowdfunding</p> <ul style="list-style-type: none"> • \$125,000 SOS/ISL Grant • \$330,000 from 70 members (\$500-\$40,000) 	<p>Crowdfunding; securing information now</p> <p>Deliver info to members around January 2022</p>
<p>Access Wiley and Oxford ebooks</p> <p>No additional fees for:</p> <ul style="list-style-type: none"> • Unlimited access for all CARLI Governing Members • May be used as course materials or for course reserves • Direct links may be embedded into course management systems 	<p>July 2020-June 2021</p>	<p>July 2021-June 2022</p>	<p>July 2022-June 2023</p>

WILEY/OXFORD EBOOK PROJECT: CONTENT

	FY21	FY22	FY23
Content available	<p>~3,000 Wiley Online Books</p> <ul style="list-style-type: none"> Published between 2017-2021 <p>Oxford Scholarship Online ebooks and all titles available for 18 Partner Presses</p> <ul style="list-style-type: none"> Published between 2018-June 2021 	<p>~23,000 Wiley Online Books</p> <ul style="list-style-type: none"> All online books on platform <p>~3,200 Oxford Scholarship Online ebooks</p> <ul style="list-style-type: none"> Published between 2018-June 2022 Nine Subject Collections: Biology, History, Law, Music, Political Science, Psychology, Religion, Social Work, and Sociology 	<p>Working with Wiley/Oxford for options now</p>

	FY21	FY22	FY23
<p>Purchase ebooks (CARLI and members)</p> <p>Funding used for:</p> <ul style="list-style-type: none"> • Purchases made from most heavily used items & newer titles • Members given opportunity to purchase ebooks at negotiated rate • CARLI has perpetual access to purchased titles with unlimited use 	July 2021	July 2022	July 2023
Number purchased for perpetual access	3,735 titles		

Resource sharing is highly valued

- Crowdfunding can work
- Member support provides great access and ownership!
 - More than what any one member can individually purchase

- CARLI provided 702 paid registrations to ELUNA Learns 2020 and 2021 sessions for members
- CARLI staff presented 85 topical webinars between July 2020-June 2021 on Alma and Primo VE including:
 - Open Office Hours
 - Tech Services and Resource Sharing topical sessions
 - Recap sessions following Ex Libris training webinars
- CARLI staff held hundreds of direct conversations with members on Alma configurations and settings



- Voyager resource sharing suspended March 2020
- Alma launched June 24, 2020
- Alma AFN (Automated Fulfillment Network) resource sharing enabled as libraries were able to provide service
 - 52 institutions by August 17, 2020
 - 77 institutions by November 1, 2020
 - 83 institutions by February 1, 2021
 - Today, all 89 I-Share libraries have AFN enabled to the level appropriate for their institution



- Implementing single sign-on for Alma and Primo VE
 - 69 I-Share institutions (24 non-I-Share institutions) using OpenAthens (CARLI pays for through June 2023)
- Establishing data feeds for patron records
 - 74 participants successfully implemented and running Alma SIS (Student Information System) synchronizations
- Learning how to make use of Alma and Primo VE’s abilities to manage and optimize discovery of e-resources as well as physical resources, both at the institution and consortium level
- Deduplicating bib records and eliminating unused records



I-SHARE 2021: TITLE AND USER CLEANUP PROJECT

- CARLI staff know that this project is a distraction that your staff had not planned for
- Consequently, CARLI took an unprecedented step for our consortium to contract external cataloging staff to perform as much of the data work as possible
- The CARLI Office staff identify records that can be deleted/merged/or moved to Network Zone records, and provide these reports to I-Share library staff to review, saving library staff the time and effort of finding these data
- I-Share libraries may opt to do the data work themselves or have CARLI do it for them at no charge to the library
- Every I-Share library is different, so we are offering consultation sessions with individual libraries about their data cleanup options. Contact us to schedule one for your library!



MORE INFO ABOUT TITLE COUNT REDUCTION PROJECT



The screenshot shows the CARLI website header with the logo and navigation menu. The main content area features a breadcrumb trail, the I-Share logo, and a secondary navigation menu. The title of the page is 'CARLI I-Share Alma Title Count Reduction Project'. Below the title, there is a revision date and an 'Overview' section. The overview text explains the need to reduce bibliographic titles and lists three areas for record clean-up, with a bullet point highlighting the first priority.

 **CARLI** Consortium of Academic and Research Libraries in Illinois

NEWS JOBS EMAIL LISTS MEMBER DIRECTORY CONTACT

PRODUCTS & SERVICES MEMBERSHIP EVENTS GOVERNANCE ABOUT Search

PRODUCTS & SERVICES / I-SHARE / CARLI I-SHARE ALMA TITLE COUNT REDUCTION PROJECT

 I-Share OVERVIEW DOCUMENTATION LIAISONS GUIDE ANNUAL STATISTICS SEARCH I-SHARE >>

CARLI I-Share Alma Title Count Reduction Project

Revised: November 1, 2021

Overview

I-Share libraries need to reduce our total number of Bibliographic Titles. CARLI's Alma subscription currently allows us to have over 46 million titles across the entire consortium, i.e., 89 Institution Zones (IZ) plus the Network Zone (NZ). We are currently over our allowance, but we know many duplicates were introduced as the result of our migration to Alma from multiple sources, including Voyager, SFX, and other e-resource systems like 360.


Ex Libris and CARLI have identified three areas where we have an excess of records that we can reduce by performing record clean-up:

1. Most I-Share libraries have activated electronic resources in their IZs that are identical to collections that already are or may be provided centrally by CARLI via the NZ. This carryover of practices from Voyager isn't unusual, but it is the largest source of duplicate titles across the consortium.

- Our first priority will focus on → [Open Access and Free E-Collections that are shared from the NZ](#). As freely-available resources, these resources do not require patron authentication nor acquisition transactions, and do not need to be in the IZ.

<https://www.carli.illinois.edu/products-services/i-share/title-count-reduction/project-overview>

TITLE AND NAMED USERS OVERAGE ANNOUNCEMENTS




CARLI Consortium of Academic and Research Libraries in Illinois

NEWS JOBS EMAIL LISTS MEMBER DIRECTORY CONTACT

PRODUCTS & SERVICES MEMBERSHIP EVENTS GOVERNANCE ABOUT Search

PRODUCTS & SERVICES / I-SHARE / I-SHARE TITLE AND NAMED USERS OVERAGE ANNOUNCEMENTS

 I-Share OVERVIEW DOCUMENTATION LIAISONS GUIDE ANNUAL STATISTICS SEARCH I-SHARE >>

I-Share Title and Named Users Overage Announcements

Revised: 10/26/2021

Back to the → [CARLI I-Share Alma Title Count Reduction Project Home Page](#)

This page contains the text of of announcements sent to CARLI I-Share email lists about the Title Count Reduction or Named Users Overage projects with the most recent announcement at the top and older announcements below. Please note that past announcements may be superseded by new information as work continues, so consult the current CARLI webpages on the → [Alma Title Count Reduction Project](#) and the → [Named Users](#) for the most current information!

Title Count Reduction Project Announcements

I-SHARE ALMA TITLE COUNT REDUCTION-FORMERLY FULLY SUBSIDIZED ASP E-COLLECTIONS-PLEASE RESPOND TO SURVEY BY NOV 1

To: I-Share Liaisons and I-Share Directors of 29 I-Share institutions

This message is aimed at I-Share Directors and I-Share Liaisons at institutions that have the "Black Thought and Culture" and "Women and Social Movements in the United States, 1600-2000" collections from Alexander Street Press.

<https://www.carli.illinois.edu/products-services/i-share/title-count-reduction/announcements>

Establish and communicate the value proposition for academic and research libraries in Illinois



CARLI | COUNTS

Analytics and Advocacy for Service Development

Added a one-year, no-cost extension to “CARLI Counts: Analytics and Advocacy for Service Development”

Allows for a Cohort 3 (now in session!)

Funded by a \$243,885 Institute of Museum and Library Services Laura Bush 21st Century Librarian Program grant



CARLI Mission

We empower our academic and research libraries to build and sustain an accessible, diverse, and responsive knowledge environment that promotes excellence and innovation in teaching, learning, and research. CARLI adds value for all member libraries by sharing costs, collections, expertise, programs, products, and services.

CARLI Statement of Values

We are committed to:

- Diversity, equity, inclusion, and accessibility
- Intellectual freedom, privacy, and open access to information resources
- Careful stewardship of all CARLI resources
- Advocacy for academic and research libraries at the local, state, regional and national levels
- Supporting cooperation and engagement among academic and research libraries
- Being responsive to member needs
- Identifying and implementing collaborative solutions to shared challenges and reducing barriers



REMINDER ABOUT COMMUNICATIONS

<https://www.carli.illinois.edu/membership/mem-libs>

NEWS **JOBS** **EMAIL LISTS** **MEMBER DIRECTORY** **CONTACT**

CARLI Consortium of Academic and Research Libraries in Illinois

PRODUCTS & SERVICES **MEMBERSHIP** **EVENTS** **GOVERNANCE** **ABOUT** Search

MEMBERSHIP / PARTICIPATING LIBRARIES / SOUTHERN ILLINOIS UNIVERSITY EDWARDSVILLE

Southern Illinois University Edwardsville

Participating Libraries

- Membership Benefits
- Membership Categories & Fees
- CARLI Membership Agreement
- I-Share Agreement

Membership Level: GOVERNING **Three Letter Code:** sie

Library Website: <http://www.siu.edu/lovejoy-library/> **Library Staff**

Library Staff Directory: <http://www.siu.edu/lovejoy-library/about/staff.shtml> **Subsidized Products & Subscriptions**

Lovejoy Library **Library phone:** 618-650-4636
Library fax: 618-650-2717

30 Hairpin Dr.
Campus Box 1063
Edwardsville, IL 62026-1063

Update Your Member Page

Library Staff

Director:	Elisabeth Pankl 618-650-2712
E-Resources Liaison:	Neil Das 618-650-5244
ILDS:	Deirdre Johnson 618-650-2174
CONTENTdm:	Marlee Graser 618-650-5215
I-Share Liaison:	Marlee Graser 618-650-5215
Circulation:	Michele Bigham 618-650-2273
Patron Billing:	Michele Bigham 618-650-2273
Inter-Library Loan:	Deirdre Johnson 618-650-2174
Public Services:	Juliet Gray 618-650-3129
Technical Services:	Tammie Busch 618-650-3730

ALL ABOUT CARLI

Supporting Illinois' Academic Libraries for more than 40 Years

CARLI is a membership organization for libraries, providing services at scale to Illinois academic and research libraries.



UNIVERSITY OF ILLINOIS SYSTEM

Altogether Extraordinary™

What is CARLI's value to libraries and to Illinois higher education?

CARLI frees dollars within each member organization—including each University of Illinois campus—to do mission-critical work. The University of Illinois System supports CARLI and reaffirms the central role that education and higher education can play in promoting the public good for the entire State of Illinois and beyond.

CARLI is unique in the United States, empowering academic research in the state of Illinois and fueling innovation. CARLI gives Illinois students and our state a competitive advantage.

What do CARLI members receive?

- No-cost subscriptions to academic research databases
- Eligible to participate in I-Share, the online catalog
- E-resources price negotiation and contract brokering
- No-cost 24-hour delivery of library materials
- No-cost training for library staff

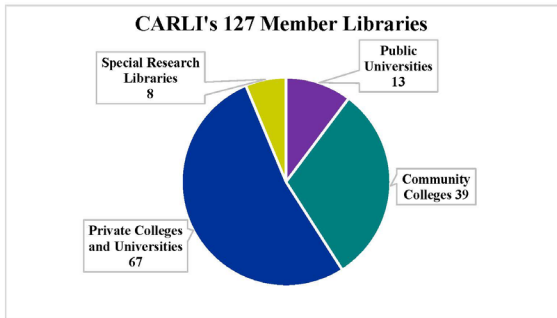


CARLI serves students from diverse backgrounds, including underrepresented groups and first-generation college students.

CARLI serves 90% of Illinois' higher education students and faculty.

Who are CARLI members?

- ALL Illinois' public universities
- ALL Illinois' community colleges
- 67 of Illinois' 91 private colleges and universities
- 8 special research libraries like the Abraham Lincoln Presidential Library, the Illinois State Library, and the Newberry Library



CARLI serves as a coordinator for important initiatives like creating open educational resources, assessment of library impact, submitting grant requests, and providing training and education for members.

CARLI helps make Illinois academic and research libraries world-class by providing:

- E-resources (articles, maps, images, books) from all disciplines
- Print books accessible to students from all over the world
- Trained staff ready to focus on students' needs

What are CARLI's FY21 revenue sources?

- University of Illinois System Office: \$3.5 million
- CARLI Membership Fees and assessments for optional services: \$2.2 million
- Pass-through revenue:
 - Subscriptions to databases: \$14.5 million
 - Delivery grant from the Secretary of State/Illinois State Library: \$855,000

What do members say about CARLI?

- CARLI links the profession and is depended on to enrich professional lives.
- CARLI helps libraries level the playing field.
- 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 members a springboard to shape important library services.
- The relatively modest investment the State of Illinois and members make impacts millions statewide.
- CARLI has tremendous potential to coordinate strategic best practices.
- Members need a healthy CARLI to stay vibrant locally; CARLI's success is inseparable from member libraries' success.

I-Share, the Library Services Platform

The I-Share library services platform serves as the online public catalog for 89 CARLI member libraries, including the three University of Illinois libraries.

I-Share is more than a catalog; it enables discovery and sharing of all materials among libraries. Especially with recent campus reductions to members' budgets, that sharing is essential to meet student and faculty research needs.

I-Share is named as CARLI's most valued service by members

- Resource sharing benefits impact *all* Illinois residents
- The power of the shared catalog
 - 38 million items, a shared collection that ranks among the world's largest research libraries
 - collections throughout the state delivered in 24 hours
- I-Share libraries could not operate a separate system for a comparable cost
 - staff, software, administration, staff education
- I-Share familiarity
 - transferring students move to new Illinois schools with an advantage

Without I-Share

- Students and faculty would be immediately and adversely impacted...
 - Campuses would be forced to buy or borrow needed materials at additional expense.
 - Fulfillment of research needs would take noticeably longer.

<https://www.carli.illinois.edu/sites/files/carlidocs/AboutCARLI.pdf>

**Encourage innovation in skills, services and programs,
in all aspects of CARLI libraries**



CARLI partners with nine other library consortia to create the Professional Development Alliance

- No-cost opportunities
- Several every month; on the CARLI Event Calendar
- Find recordings and slides from past programs at <https://www.carli.illinois.edu/products-services/prof-level>

We are eager for your suggestions! support@carli.illinois.edu



PDA by the numbers

- 139 total programs offered to CARLI Members from all PDA Consortia in FY21 and FY22 to date; 20 CARLI-Sponsored Programs:
 - 2,369 registrants
 - 1,396 live attendees
 - 673 views of recordings
- Upcoming CARLI-Sponsored Programs:
 - January 19: The Before and After: Returning to Work with COVID Restrictions Still in Place with Joan Schuitema
 - January 25: Working with Fire Professionals with Chief John High
 - February 9-11: Directors' Institute
 - March 1: Save the Date for a program with Emily Knox
 - March 8 and 15: two-part Open Pedagogy Series with Will Cross

**More information to
come!**

**February 9-11, 2022
9 a.m.-noon**





Fiscal Year 2021 CARLI Research Funding Program

- *Caring for the Library Outsider: a Pedagogy of Care for Academic Librarians*
- Rebecca Donald, Trinity International University
 - Interviewed 26 librarians (16 were CARLI members) about a feminist pedagogy of care for academic librarians
 - Currently compiling the results of these interviews
 - Themes of note include:
 - The challenges of caring for students during the COVID-19 pandemic
 - A passion for DEI (diversity, equity, and inclusion) initiatives in libraries
 - Library directors considering how to care well for their staff

Project results will be presented in a webinar for CARLI in the coming year.



Fiscal Year 2021 CARLI Research Funding Program

- *Zotero Promotion and Support: Promote Best Practices and Enable Integration*
- David Stern, Saint Xavier University
 - Grant created a clearinghouse of best practices, teaching materials (videos, screen shots, guides), and tips and tricks.
 - Materials available from: <https://www.carli.illinois.edu/products-services/pub-serv/zotero#overlay-context=prof-devel/fundedresearchprojects>
 - Grant will also mail a set of six posters (containing the screen shots that are available on the web site) to CARLI libraries upon request.
 - Send your complete mailing address to: stern@sxu.edu

- I-Share title and user cleanup project
- Illinois SCOERs program
- CARLI Counts
- Ebooks crowdfunding project for FY23
- Bylaws update
- Continued work on the Shared Institutional Repository
- Professional Development Alliance planning and looking at topics for CE programs
- Evaluating needs based on new types of work/interaction

I'D LOVE TO HEAR FROM YOU!



CARLI

Consortium of
Academic and Research
Libraries in Illinois

Anne Craig

Senior Director, CARLI

The Consortium of Academic and Research Libraries in Illinois

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Time for your questions!

