

# CARLI 2022 Strategic Plan

**THE CARLI 2022 STRATEGIC PLAN** plan outlines our organization's aspirations and defines our understanding of the consortium's focus as we move towards the fifteenth anniversary of CARLI on July 1, 2020, and the fortieth anniversary of resource sharing among Illinois academic libraries in 2020. During this time, CARLI will be focused on providing excellence and leadership, and on providing services at scale when value can be achieved.

Our member libraries have been supporting academic achievement for decades. The power of the collaborative articulated in this plan is one that knits together value, expertise, solutions, and engagement, so that member libraries can concentrate on local initiatives and services.

We are grateful to all who have contributed to the development of this plan, including the CARLI member library staff who provided their feedback. The exercise of compiling the plan was tremendously positive for the organization. It allowed us to take time to discuss priorities and expectations, challenges and accomplishments, and to set our sights on how we would like CARLI to look in the future.

Anne Craig  
*CARLI Senior Director*  
December 6, 2019

## MISSION

The Consortium of Academic and Research Libraries in Illinois empowers Illinois academic and research libraries to create and sustain a rich, supportive, and diverse knowledge environment that furthers excellence in teaching, learning, research, and innovation in order to serve students, faculty, and researchers. As a collective, CARLI adds value to member libraries of all types, sizes, and missions by sharing costs, collections, expertise, programs, products, and services.

## VALUES

**CAREFUL STEWARDSHIP** of all CARLI resources

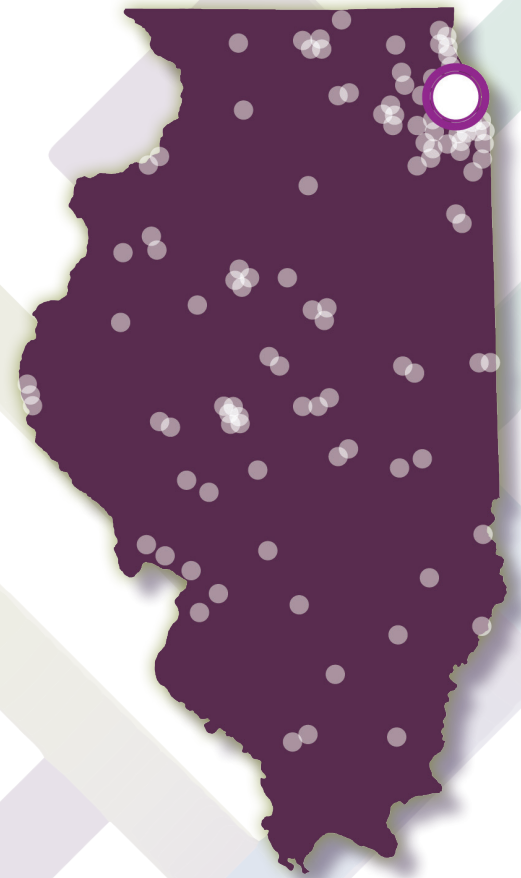
**COOPERATION AND ENGAGEMENT** among academic and research libraries

**RESPONSIVENESS** to member needs

**COMMITMENT** to intellectual freedom, privacy, security of library records, library standards, and open access to information resources

**ADVOCACY** for academic and research libraries at the local, state, regional, and national levels

**INNOVATION** in identifying and implementing collaborative solutions to shared challenges



# Strategic Priorities: Supporting Goals and Actions

1

## Careful Stewardship

### ENSURE ADEQUATE, SECURE, AND STABLE FUNDING FOR CARLI

**GOAL:** Monitor impact of state and institutional funding on member libraries

**ACTION:** Regularly survey the membership to gather data about member budget concerns

**GOAL:** Explore alternative funding opportunities

**ACTIONS:** In FY21 and FY22, monitor I-Share data to prepare and develop an assessment model based on the new library platform

Provide opportunities for crowd funding of specific resources that cannot be funded centrally

**GOAL:** Prioritize CARLI operations in support of core services

**ACTION:** Monitor usage of, and satisfaction with current products and services to ensure alignment of funding and satisfaction

**GOAL:** Explore opportunities to collaborate with other states or organizations or academic library affiliated organizations

**ACTION:** Ask for Board input to help identify likely partners Seek opportunities

2

## Cooperation and Engagement

### ENHANCE COLLABORATION AMONG LIBRARIES BY IDENTIFYING, NURTURING, AND SUPPORTING SERVICES AND PROGRAMS THAT CAN BEST BE PROVIDED AT SCALE

**GOAL:** Provide mechanisms for group collaboration; identify and leverage model programs, initiatives, and ideas

**ACTIONS:** Create and/or facilitate opportunities for regional and topical periodic gatherings of CARLI directors and library staff

Investigate alternative methods for meetings

**GOAL:** Identify new services/programs that are scalable and replicable

**ACTION:** Work with committee members to monitor emerging trends and the work of other consortia

**GOAL:** Leverage the CARLI committee structure to assess and evaluate services and programs

**ACTIONS:** Board liaison to each CARLI committee and task force provides feedback on programs and services, and ensures committee efforts are informed by the strategic priorities set by the Board

Periodically review the committee structure to ensure alignment with consortial priorities

# 3

## Responsiveness and Commitment

### PROVIDE RESOURCES/SERVICES/TOOLS FOR DISCOVERING AND OPTIMIZING INFORMATION RESOURCES AND COLLECTIONS

**GOAL:** Support the needs of member libraries with a focus on the superior functioning of the CARLI portfolio of services and programs

**ACTION:** Ensure that change and migration, the high availability of services, the resolution of service issues, and the improvement of performance are reflected in the organization's budget and planning processes

**GOAL:** Expand participation in I-Share

**ACTION:** Actively promote I-Share participation among non-I-Share libraries

**GOAL:** Facilitate and strengthen connections between member libraries

**ACTION:** Support opportunities for participation in topical and/or regional projects for CARLI directors and staff

**GOAL:** Identify service priorities

**ACTION:** Regularly survey the membership to gauge member priorities

**GOAL:** Leverage expertise of member libraries

**ACTIONS:** Collect and promote best practices and strategies from CARLI member libraries  
Investigate ways to promote and Grow collections in I-Share

**GOAL:** Seek grants that fund innovation and new services

**ACTION:** Pursue sponsorship and/or grant funding for programs and/or services

# 4

## Advocacy

### ESTABLISH AND COMMUNICATE THE VALUE PROPOSITION FOR ACADEMIC AND RESEARCH LIBRARIES IN ILLINOIS

**GOAL:** Connect CARLI and member library programs and services to student outcomes such as retention and completion

**ACTIONS:** Expand CARLI's continuing education program to help member libraries assess their impact on student outcomes such as retention and completion

Replicate successful projects from CARLI Counts statewide

**GOAL:** Document the value that CARLI creates; articulate to policymakers and legislators how CARLI provides value to the State of Illinois and why it is a good investment of taxpayer dollars

**ACTIONS:** Measure ROI of services/programs to ensure that financial resources and staff efforts are focused on identified priorities

Identify and gather CARLI success stories; furnish information to stakeholders and policymakers

# 5

## Innovation

### ENCOURAGE INNOVATION IN SKILLS, SERVICES, PROGRAMS, AND ALL ASPECTS OF CARLI LIBRARIES

**GOAL:** Encourage member libraries to think innovatively about serving students and faculty

**ACTIONS:** Highlight and promote member library innovations using CARLI communication channels and CARLI events

Convene CARLI groups on specific in-demand topics identified through periodic communications with members

**GOAL:** Connect institutions that have similar interests/needs by providing opportunities for interaction and collaboration

**ACTION:** Identify libraries of disparate types and sizes that are uniquely connected to their students, faculty, and communities