# Consortium of Academic and Research Libraries in Illinois (CARLI)
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10-30-2009

# CARLI Annual Report of Activities

Consortium of Academic and Research Libraries in Illinois

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# CARLI

## Annual Report of Activities
October 30, 2009

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## CARLI Board of Directors

**Karen Schmidt, Chair**
Illinois Wesleyan University, Private Institutions (2010)

**Connie Bakker, Vice Chair-Chair Elect**
College of Lake County, Community Colleges (2011)

**Mary Case, Past Chair**
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Columbia College, Private Institutions (2011)

Anne Craig
Illinois State Library, Ex Officio

Scott Drone-Silvers
Lake Land College, At large (2010)

Cheryl Elzy
Illinois State University, At large (2011)

Cindy Fuller
Millikin University, Private Institutions (2012)

Kathryn Harris
Abraham Lincoln Presidential Library, Associate Member (2010)

Paula Kaufman
University of Illinois at Urbana-Champaign, Public Universities (2010)

Allen Lanham,
Eastern Illinois University, Public Universities (2011)

Susan Singleton
CARLI Executive Director, Ex Officio

Donna Smith
Kankakee Community College, Community Colleges (2012)

Lisa Stock
College of DuPage, At large (2012)

Anna Maria Watkin
Parkland College, Community Colleges (2010)

VACANT   Illinois Board of Higher Education, Ex Officio

## Headquarters Staff

| | |
|---|---|
| **Administration** | Susan Singleton, Executive Director and Assistant Vice-President, Academic Affairs<br>Tom Dorst, Director, Administration and Planning |
| **Business & Finance Services** | Connie Walsh, Chief Financial Officer<br>Diane Day, Delivery Program Administrator/Accountant<br>Katrina Little, Account Technician I<br>Cheryl Brown, Administrative Assistant<br>Becky Blackburn, Secretary |
| **Communications** | Margaret Chambers, Assistant Director, Communications<br>Ed Schell, WebMaster |
| **Collections Services** | Elizabeth Clarage, Director, Collections Services |
| **Data Services** | Cathy Salika, Associate Director, Data Services<br>Kathy Chang, Senior Research Programmer<br>Gordon Fellows, Senior Research Programmer<br>Anne Hudson, Application Support Specialist |
| **E-Resources** | Cindy Clennon, Director, Electronic Resources<br>David Hamilton, Program Coordinator |
| **Systems Services** | Brandon Gant, Associate Director, System Services<br>Chris Delis, Application Support Specialist<br>Todd Pavlik, Research Programmer<br>Chris Saunders, Database Specialist<br>Patrick Zurek, Application Support Specialist |
| **User Services** | Kristine Hammerstrand, Director, User Services<br>Lorna Engels, Library Systems Coordinator<br>Mel Farrell, Library Systems Coordinator<br>Jessica Gibson, Library Systems Coordinator<br>Amy Maroso, Library Systems Coordinator<br>Jennifer Masciadrelli, Library Systems Coordinator<br>Casey Sutherland, Library Systems Coordinator<br>Paige Weston, Library Systems Coordinator |

The Consortium of Academic and Research Libraries in Illinois provides library services and support to Illinois public universities, community colleges, private colleges and universities, and special libraries.

## CARLI Members

- 153 Governing, Associate and Basic member institutions.

- CARLI serves over 675,000 higher education faculty and students.

- Over 98% of all Illinois higher education students are enrolled at CARLI member institutions.

## Delivery

The Illinois State Library provides funding for the Illinois Library Delivery Services (ILDS) with operational and management support from CARLI.

- ILDS serves 155 separate locations, making more than 40,000 scheduled stops annually.

- Over 1.4 million items were delivered in FY 2009. Items reported damaged in delivery amounted to less than 0.001% of all items transported.

- Statewide dock-to-dock delivery time for virtually all items was 24 hours.

- The average cost to send a book through ILDS is just 48.2¢.

## I-Share

- Supports 76 member institutions, serving over 380,000 FTE students.

- Nearly 3 million items circulated in FY 2009 of which 369,152 were loaned to patrons in other I-Share libraries.

- Over 10 million titles and 35 million items are represented in I-Share.

- The I-Share Voyager software was upgraded to Version 7.1 in June 2009. The I-Share Users' Group, team members and CARLI staff performed extensive testing, revised documentation, and conducted and attended multiple training webinars throughout the spring to make this possible.

## E-Resources

CARLI members may choose to obtain electronic resources and/or services at reduced and/or subsidized rates:

- The Spring 2009 Database Selection period ended with an 8% increase in spending and a 5% increase in the number of subscriptions over the Spring 2008 period

- The Fall 2009 Selection period will include new products new products ARTstor, JSTOR and Nature.

- 24/7 access to the online Chronicle of Higher Education is available to CARLI member patrons at an annual cost of 50¢ per student/faculty member, of which Governing members pay just 12.5¢.

- Members can acquire the 350 full text journal titles in the Sage Deep Backfile back to Volume 1, Issue 1 at a one-time cost that is just 11% of the list price.

## Digital Collections

CARLI uses CONTENTdm to store and provide access to digital versions of primary source materials, making a wide variety of media types including images, journals, books, audio and video files, maps, and newspapers accessible for search and display on a typical personal computer with an Internet connection and a web browser.

- Since October 2008, 26 new collections have been published, nearly doubling the total number of collections hosted at http://collections.carli.illinois.edu

- CARLI Digital Collections contain more than 57,000 digital items (as of October 2009).

## Collections Services

CARLI works to meet the diverse information needs of faculty, students, and other library users in Illinois by encouraging cooperative library activity in order to make the best use of its resources.

- Over 2300 items digitized through the CARLI/Open Content Alliance Digitization Initiative are available at http://www.archive.org/details/carli_lib Items in the CARLI collection have been downloaded more than 65,000 times. Johnson's Urbana-Champaign, Illinois city directory (Volume 1936), University of Illinois at Urbana-Champaign, and the Directory and almanac of the Bohemian population of Chicago, Newberry Library are currently the most frequently downloaded items.

- The Last Copy pilot launched in late April. Over 1000 items have been offered for donation, of which 95% have been accepted.

- The FY2010 Collections Enhancement Awards Program funded two Collection Partnerships and 5 Access & Analysis proposals for a total of $70,000.

- Twelve institutions are participating in the Center for Research Libraries (CRL) Membership Subsidy Program.  The program, approved by the Board in September 2008, subsidizes 50% of the annual CRL membership fee, up to $2000/year for 2 years.

## Continuing Education

Through the work of committees, working groups, users' groups, teams, and task forces, and the CARLI staff, the consortium presented a wide array of educational and informational events. In FY 2009 there was a growing trend toward collaborative program planning among working groups, users' groups and teams, and this resulted in a number of innovative topics and creative presentations.

- Approximately 135 staff members from more than 60 different member institutions served on the Board, committees, working groups, users' groups, teams, and task forces in FY 2009.

- There were 2,221 registrants for CARLI continuing education events.

- 76.5% of all CARLI libraries registered at least one staff member to a CARLI event.

- 47 member institutions sent 20 or more staff to CARLI training and events.

## IT Systems and Services

- A newly redesigned server environment went live as a production system in August 2008. The new environment increased the capacity of CARLI systems, decreased energy costs for the University of Illinois by over $35,000 annually, and decreased CARLI's annual equipment maintenance costs by over $140,000.

  Savings with the new server hardware:
  - Power:              –87%
  - Cooling:            –87%
  - Weight:             –91%
  - Rack Space:         –87%
  - Maintenance Costs:  –92%

  Capacity increases based on the new server environment:
  - CPU:    +7.4x
  - RAM:    +2.3x

- New equipment in the CARLI training room represents a 64% decrease in energy costs compared to the stand-alone laptops that were used previously.

# Strategic Priorities 2008-2010

The CARLI Board of Directors approved these strategic priorities in September 2007. The following information serves to highlight *a few* of the many CARLI projects started or completed in the last year that relate to the CARLI strategic priorities.

## *Collaboration and Leadership*

### *Facilitate effective communication around members' needs.*
- Quarterly update for CARLI library directors
- Electronic newsletter
- CARLI Member Value/Return on Investment information
- Increased use of webcasting for training, forums and Voyager upgrade preparation and training
- Expanded use of wikis by CARLI committees, working groups and users' groups for collaborative work.
- Topical CARLI blog posts including digitization quick tips, featured images from CARLI Digital Collections, WebVoyage display, and SFX documentation
- Governing Directors Meeting, October 2008
- Working Group and Committee Chairs Meeting, October 2008
- CARLI Membership Assessment Survey, March 2009
- CARLI on Facebook and Twitter, Public launch, January 2010

### *Catalyze communication and evaluation of emerging trends.*
- *The detailed summary of CARLI's continuing education events for FY2009 and FY2010 is available on pages 13-15.*

### *Develop leaders by embracing new models of participation for staff in CARLI libraries.*
- Tutorials Interest Group, conference calls, wiki and email list
- Sarah Miller, Visiting Academic Professional 2008-09
- OPAC Usability Testing Volunteer Group
- Public Services Open Houses hosted by CARLI libraries around the state
- Resource Sharing Code Revision Task Force
- CARLI Membership and Governance Task Force
- Aggregated Database Task Force
- ERMS Task Force
- Collections Enhancement Awards Evaluation Task Force
- Digital Collections Users' Group/Preservation Working Group Joint Subcommittee on Digital Preservation
- Sponsorship of IACRL Academic Librarian of the Year Award

### *Investigate an increase in CARLI staffing levels and funding capabilities to strengthen leadership strategies and customer support services to members.*
- Activity currently on hold as a result of the ongoing state fiscal challenges.

*Enhance and expand the visibility of CARLI in partnership with member libraries through various means such as marketing, white papers, or conference presentations.*

- 2008 Charleston Conference, "Monograph Collection Assessment in an Illinois Academic Consortium: What are we Buying and How is it Used?," Tina Chrzastowski, Lynn Wiley, University of Illinois at Urbana Champaign.
- Alliance Library System Spring Break for Academic Librarians, "CARLI Open Content Alliance Book Digitization Initiative," Elizabeth Clarage.
- ExLibris Users of North America (ELUNA) conference, "Strategies and Methods for Administering SFX: Managing Monthly Update Reports," Sarah Miller. "Strategies and Methods for Administering SFX: Deciding to Load Local Holdings," Sarah Miller and Paige Weston. "A Trio of Topics for Confident Access Query Writers," and "What's the Worst that Could Happen? Troubleshooting Your Voyager Queries," Cathy Salika.
- Conference and research project funded by CARLI, research project managed by Tina Chrzastowski and Lynn Wiley, Co-Primary Investigators, University of Illinois at Urbana-Champaign. "Our I-Share Monograph Collection: A Call for Collaboration."
- Library and Information Technology Association (LITA) conference, "VuFind at the University of Illinois," Jenny Emanuel and Peggy Steele, University of Illinois at Urbana-Champaign, and Paige Weston.
- ExLibris South Central Users Group (ELSUG) "A Trio of Topics for Confident Access Query Writers" and "What's the Worst that Could Happen? Troubleshooting Your Voyager Queries" webinars, Cathy Salika.
- Illinois Library Association (ILA), David Hamilton, Executive Committee, elected Spring 2009.
- ExLibris Users of North America (ELUNA), Kristine Hammerstrand, elected to the Steering Committee, Spring 2009.
- Illinois Academic & Research Libraries (IACRL), Elizabeth Clarage, President-elect, Fall 2009.
- International Consortia of Library Consortia (ICOLC), CARLI hosting annual conference, March 2010.

*Educate member libraries on issues, innovations, services and best practices for physical and digital collections.*

- Last copy pilot project launched in April 2009 to retain the last copy of library materials in CARLI libraries.
- Preservation Webliography of preservation and conservation resources
- Digital Standards Subcommittee, Revised and updated "Guidelines for the Creation of Digital Collections: Digitization Best Practices for Images and Text."
- Digital Collections Users' Group/Preservation Working Group Joint Subcommittee on Digital Preservation report and recommendations for the CARLI Board, Target December 2009.
- *The detailed summary of CARLI's continuing education events for FY2009 and FY2010 is available on pages 13-15.*

*Innovation*

*Foster a climate of experimentation and acceptable risk through piloting new technologies and services, balancing rapid implementation with appropriate consultation.*

- VuFind alternative interface to the I-Share catalog
- Founding Sponsor of the eXtensible Catalog Project
- Designed and implemented new server environment that is significantly more energy efficient and has lower maintenance fees.
- Purchase on Demand Pilot project is currently in the planning stages
- "Text Me This Call Number" feature implemented in WebVoyage and VuFind
- Investigated Voyager Analyzer, Oracle Streams and DataGuard to improve reporting capabilities and data synchronization.

*Explore ways to provide seamless integration of disparate content discovery tools.*

- Development support for eXtensible Catalog's Metadata toolkit
- Library support for OCLC WorldCat
- Investigating E-Z Search for CARLI libraries

*Explore opportunities to work with outside organizations to improve services.*

- University of Rochester eXtensible Catalog, Founding Sponsor
- Committee for Institutional Cooperation (CIC)
- CODSULI
- Midwestern Consortia
- GoogleBooks implemented in VuFind
- Syndetic Solutions Indexed Content Enrichment in VuFind
- UIUC Yankee Book Peddler Contract

*Encourage and support innovation and experimentation in member libraries.*

- Collection Awards for access and analysis
- CARLI/Open Content Alliance Book Digitization Initiative

## Resource Sharing

*Broaden access to CARLI member collections through digitization and other means.*

- CARLI/OCA Book Digitization Initiative
- Redesign and upgrade of CARLI Digital Collections/CONTENTdm interface
- Cataloging Electronic Resources in the OPAC Task Force

*Explore alternatives to physical delivery.*

- Center for Research Libraries member subsidy

*Improve time from request to delivery to 2-3 days within CARLI.*

- ILDS 24-hour point-to-point delivery

*Work toward establishing standardized transaction times and loan periods within I-Share.*

- Resource Sharing Code Revision Task Force Recommendations, Target implementation, July 2010.

## E-Resources

*Create clear, realizable, consortial licensing principles to guide CARLI and member libraries in effective negotiations.*

- E-Resources Licensing Principles and Standard E-Resources Agreement Language

*Educate member libraries on techniques and best practice for e-resource negotiations.*

- *The detailed summary of CARLI's continuing education events for FY2009 and FY2010 is available on pages 13-15.*

*Work with other consortia and publishers to create new models for e-resource acquisitions.*

- o Current Springer e-Books offer includes no enforcement of Digital Rights Management (DRM). This will allow unlimited printing, emailing, and inclusion in non-commercial materials.

# CARLI Member Survey 2009 ~ Summary Findings

CARLI staff administered the survey in the spring of 2009. The survey sought feedback on the projects and services that CARLI provides, and guidance on where to place resources. Following are summary results of the survey. Details will soon be available on the CARLI web site.

*Who responded:*
- We received 358 responses; affiliation of the responses roughly reflects the profile of institutional membership.
- Respondents represented a full spectrum of work responsibilities within the libraries.
- 70% of the respondents have worked in libraries more than 10 years; 14% have worked in libraries 5 years or less.

*Service Value Findings:*
- 86% perceive CARLI as important to their institutions
- 82% are satisfied with CARLI overall
- 2% felt that CARLI was not important overall; 0.8% recorded substantial dissatisfaction with CARLI
- The most important programs that CARLI provides are:
    - I-Share
    - ILDS
    - Subsidized e-resources
    - Database brokering

*Specific programs and products ranked by Importance & Satisfaction:*

| PROGRAM or PRODUCT | Importance (mean) | Satisfaction (mean) | Gap |
|---|---|---|---|
| I-Share | 4.82 | 3.86 | -0.96 |
| ILDS | 4.69 | 4.33 | -0.36 |
| Electronic database brokering | 4.63 | 4.07 | -0.56 |
| Subsidized electronic resources | 4.62 | 4.18 | -0.43 |
| Interaction with CARLI staff | 4.51 | 4.44 | -0.07 |
| Professional & technical consultations and/or problem resolution | 4.43 | 4.20 | -0.23 |
| Training and continuing education | 4.24 | 3.84 | -0.41 |
| Central management of licenses & billing | 4.14 | 4.10 | -0.03 |
| CARLI digital collections (e.g., CONTENTdm) | 3.32 | 3.60 | 0.28 |
| Collection enhancement awards | 3.22 | 3.44 | 0.22 |
| Cooperative digitization awards | 3.18 | 3.39 | 0.21 |

*Guidance on CARLI initiatives, either on-going or suggested:*

| PROJECT / INITIATIVE | High Priority | Low Priority | Don't expend any resources on this | No opinion |
|---|---|---|---|---|
| Fully develop VuFind as alternative interface for I-Share | 40.0 % | 27.2% | 8.3% | 24.5% |
| Test other discovery interfaces | 45.1 % | 29.5% | 4.5% | 20.8% |
| Participate in WorldCat Local development | 40.0% | 27.2% | 10.6% | 22.3% |
| Participate in collaborative development of open source ILS | 47.5% | 24.5% | 4.9% | 23.0% |
| Make Easy Search (from UIUC) widely available | 19.8% | 23.6% | 5.7% | 51.0% |
| Make Syndetic Solutions content searchable via VuFind | 16.5% | 27.8% | 12.0% | 43.6% |
| Upgrade CARLI digital collections public interface | 21.1% | 38.5% | 5.3% | 35.1% |
| Provide useful stats for CARLI digital collections | 23.5% | 37.5% | 6.1% | 33.0% |
| Make I-Share reporting "real time" | 31.7% | 32.8% | 7.3% | 28.2% |
| Provide collaborative space for digital preservation | 27.3% | 39.0% | 4.2% | 29.5% |
| Facilitate last copy print retention | 52.3% | 31.8% | 4.9% | 11.0% |
| Make ERMS available to members | 31.3% | 22.8% | 3.9% | 42.1% |

*Member Participation and Communication:*

The survey asked how members of our CARLI libraries engaged with the consortium. Highlights of responses include:

- Active participation in committees is limited – 25.2% served on a committee or task force in the past 2 years
- Attendance at CARLI forums, workshops, seminars, etc. was high, with 77% attending at least one event, and 55% attending multiple events in the past 15 months
- Communication with CARLI is overwhelmingly electronic: about 92% subscribe to at least one email list; 80% read the electronic newsletter, some 63% connect with CARLI staff via email; and 46% use the online support form. Only 40% used the telephone to make contact.

*Ideas for future surveys:*
- Further analysis of resource sharing strengths and challenges
- Need, planning, content, delivery & evaluation of training & informational sessions from CARLI
- Participation barriers to involvement in CARLI committees and task forces.
- Additional look at products with satisfaction & importance gaps of significance

# CARLI Committee-Sponsored Events: FY2009

| Date | Topic | Sponsor | CoSponsor | Registrants | Location | Type |
|---|---|---|---|---|---|---|
| July 25, 2008 | You Are Not Alone: Digital Projects in Illinois | DCUG | | 70 | Chicago | Forum |
| September 10, 2008 | Technical Services workflow analysis | IACQ | ICAT | 162 | Champaign | Forum |
| September 15, 2008 | Take Charge of your Monthly Update Reports | SFX IG | | | Online | Webinar |
| September 23, 2008 | Take Charge of your Monthly Update Reports | SFX IG | | | Online | Webinar |
| October 10, 2008 | Technical Services workflow redesign | IACQ | ICAT | | | Conference call |
| October 13, 2008 | The New Paradigm of Weeding Collection Program Overview | CWG | | 85 | Normal | Forum |
| October 20, 2008 | Targets: everywhere you want your users to go | SFX IG | | | Online | Webinar |
| October 24, 2008 | CARLI Annual Meeting | CARLI | | 175 | Champaign | Conference |
| October 24, 2008 | Annual Directors Meeting | CARLI | | 55 | Champaign | Conference |
| October 24, 2008 | All Chairs Meeting | CARLI | | 16 | Champaign | Conference |
| October 28, 2008 | Targets: everywhere you want your users to go | SFX IG | | | Online | Webinar |
| November 17, 2008 | Database Licensing | ERWG | | 93 | Champaign | Workshop |
| November 19, 2008 | Sources: all roads lead to the SFX menu | SFX IG | | | Online | Webinar |
| November 25, 2008 | Sources: all roads lead to the SFX menu | SFX IG | | | Online | Webinar |
| December 12, 2008 | Collection Enhancement Awards Proposals | CWG | | 21 | Chicago | Workshop |
| December 15, 2008 | Book Digitization Initiative Proposals | CWG | | 27 | Online | Webinar |
| December 15, 2008 | The Value Menu: the simplified template | SFX IG | | | Online | Webinar |
| December 16, 2008 | Collection Enhancement Awards Proposals | CWG | | 24 | Online | Webinar |
| December 17, 2008 | Book Digitization Initiative Proposals | CWG | | 14 | Online | Webinar |
| January 15, 2009 | Going the Extra Mile Best practices - resource sharing for distance students | Resource Sharing | | 30 | Online | Webinar |
| January 15, 2009 | Going the Extra Mile Best practices - resource sharing for distance students | Resource Sharing | | 32 | Online | Webinar |
| January 27, 2009 | A New Year's Resolution: reducing the clutter in your SFX menu using display logic | SFX IG | | | Online | Webinar |
| February 3, 2009 | Information sharing on technical services workflows | IACQ | ICAT | 41 | Chicago | Mini forum |
| February 16, 2009 | SFX 2008 in Review | SFX IG | | | Online | Webinar |
| February 24, 2009 | State of Confusion: Writing Your Digital Imaging Grant | DCUG | | 15 | Springfield | Workshop |
| February 24, 2009 | SFX 2008 in Review | SFX IG | | | Online | Webinar |

# CARLI Committee-Sponsored Events: FY2009

| Date | Topic | Sponsor | CoSponsor | Registrants | Location | Type |
|---|---|---|---|---|---|---|
| February 27, 2009 | I-Share report writing | IUG | | 32 | Online | Webinar |
| February 27, 2009 | I-Share report writing | IUG | | 29 | Online | Webinar |
| March 4, 2009 | E-books | ERWG | CWG | 94 | Champaign | Symposium |
| March 10, 2009 | State of Confusion: Writing Your Digital Imaging Grant | DCUG | | 23 | Chicago | Workshop |
| March 16, 2009 | Extreme makeover SFX Edition: modifying graphic files | SFX IG | | | Online | Webinar |
| March 18, 2009 | Information sharing on technical services workflows | IACQ | ICAT | 10 | Greenville | Mini forum |
| March 19, 2009 | Information sharing on technical services workflows | IACQ | ICAT | 31 | Bloomington | Mini forum |
| March 20, 2009 | Copyright Basics | PSWG | IUG | 86 | Champaign | Workshop |
| March 24, 2009 | Extreme makeover SFX Edition: modifying graphic files | SFX IG | | | | Webinar |
| April 2, 2009 | Social technologies in instruction | Instruction | | 78 | Springfield | Forum |
| April 20, 2009 | The Full-text Express: DirectLinking | SFX IG | | | Online | Webinar |
| April 28, 2009 | The Full-text Express: DirectLinking | SFX IG | | | Online | Webinar |
| April 30, 2009 | Voyager 7 upgrade Technical services workflows | ICAT | | 130 | Springfield | Forum |
| May 5, 2009 | Online I-Share tutorial development | Instruction | | 19 | Champaign | Workshop |
| May 12, 2009 | Online I-Share tutorial development | Instruction | | 18 | Chicago | Workshop |
| May 18, 2009 | Everything you ever wanted to know about SFX-Voyager integration but were afraid to ask | SFX IG | | | Online | Webinar |
| May 21, 2009 | I-Share Liaison responsibilities | IUG | | 53 | Champaign | Forum |
| May 22, 2009 | Heartland Community College site visit to examine work practices and share ideas | PSWG | | 18 | Normal | Open house |
| May 22, 2009 | Illinois State University site visit to examine work practices and share ideas | PSWG | | 20 | Normal | Open house |
| May 29, 2009 | John Wood Community College site visit to examine work practices and share ideas | PSWG | | 12 | Quincy | Open house |
| May 29, 2009 | Quincy University site visit to examine work practices and share ideas | PSWG | | 15 | Quincy | Open house |
| June 9, 2009 | Disaster planning and recovery | PWG | | 28 | Champaign | Workshop |
| June 11, 2009 | Disaster planning and recovery | PWG | | 25 | Champaign | Workshop |
| June 24, 2009 | Northwestern University site visit to examine work practices and share ideas | PSWG | | 50 | Evanston | Open house |
| June 29, 2009 | The ABC's of SFX A-Z lists | SFX IG | | | Online | Webinar |

# CARLI Committee-Sponsored Events: FY2010

| Date | Topic | Sponsor | CoSponsor | Registrants | Location | Type |
|------|-------|---------|-----------|-------------|----------|------|
| October 13, 2009 | AudioVisual Preservation Forum | PWG | | 43 | Chicago | Forum |
| October 15, 2009 | Back to the Basics While Looking Forward | Resource Sharing | | 70 | University Park | Forum |
| November 6, 2009 | Online Tutorial Creation Workshop | Instruction Team | | 24 | Chicago | Workshop |
| November 13, 2009 | Online Tutorial Creation Workshop | Instruction Team | | 25 | Chicago | Workshop |
| December 2, 2009 | I-Share Cataloging & Authority Control Team Forum (am & pm sessions) | ICAT | | | Online | Webinar |
| December 3, 2009 | I-Share Cataloging & Authority Control Team Forum (am & pm sessions) | ICAT | | | Online | Webinar |
| March 5, 2010 | Collections Working Group Forum | CWG | | | TBD | Forum |
| April 28, 2010 | Workshop on Digital and Electronic Copyright Issues | DCUG | IUG | | Champaign | Conference |
| | **Other Tentative Events** | | | | | |
| Spring 2010 | Connecting Libraries and Users: Anthropologists Helping Librarians Meet 21st Century Challenges | PSWG | | | TBD | Conference |
| Spring 2010 | Licensing Workshop Follow-up | ERWG | | | | Conference |
| Spring 2010 | E-Book Fair | ERWG | | | | Conference |
| Spring 2010 | IACQ Team Forum | IACQ | | | | Forum |
| Spring 2010 | ICAT Team Forum | ICAT | | | Upstate | Forum |
| Spring 2010 | Online Tutorial Creation Workshop | Instruction Team | Resource Sharing Team | | | Workshop |
| Spring 2010 | Reinventing One-Shot Instruction | Instruction Team | | | | Forum |
| Spring 2010 | I-Share Liaisons' Forum | IUG | | | | Forum |
| Spring 2010 | Reports Forum | IUG | | | Online | Webinar |

**Collections Working Group**
**Report Of Activities, 2008–2009**

**Members**
Mary S. Konkel (2007-2010), College of DuPage, **Chair**
Marlene Slough (2008-2011), Eastern Illinois University, **Vice-Chair**

Jerry Anderson (2007-2010), Joliet Junior College
Kathleen Bloomberg (2007-2008), Illinois State Library, resigned July 2008
Chad Buckley (2007-2010), Illinois State University
Luann DeGreve (2007-2010), Benedictine University
John Dorr (2007-2010), Illinois Institute of Technology
Frances Drone-Silvers (2008-2011), Parkland College
Katie Maier-O'Shea (2006-2009), North Park University
Heather Parisi (2008-2011), Dominican University
Lydia Morrow Ruetten (2008-2009), Governors State University, appointed August 2008
Lynn Wiley (2007-2010), University of Illinois at Urbana-Champaign

Staff Liaisons: Elizabeth Clarage, Connie Walsh

**Scope of work**

The Collections Working Group provides advice to the CARLI Board in matters relating to collection development and collection management within CARLI. Included in this charge is management of the collection partnership grants. The Collections Working Group will advise the CARLI Board about policies and structures for future collection development and collection management projects.

**Programs and Meetings**
October 13, 2008: CWG Fall Forum, Heartland Community College, Normal
October 24, 2008: Committee and Working Group Chairs' Meeting/Annual Meeting
December 12, 2008: Collections Enhancements Awards Program Proposal Workshop, Chicago
December 15, 2008:  Book Digitization Initiative Proposal Webinar
December 16, 2008: Collections Enhancements Awards Program Proposal Webinar
December 17, 2008: Book Digitization Initiative Program Proposal Webinar
March 4, 2009: CARLI E-Book Symposium, Hawthorn Suites, Champaign

**Summary**

**CARLI Book Digitization Initiative**

A listserv for participants has been created. CARLI is working with the participants to ship materials through UPS as well as CARLI staff members have driven some materials to the site. Materials may be accessed on the Internet Archive site at http://www.archive.org/ .

A subgroup of the CWG consisting of John Dorr and Elizabeth Clarage reviewed the documentation for this program for FY2010 and updated the required itemized list to include the information that is required when shipping the materials. The theme for this program remains, "Illinois Culture and Heritage."

For the FY2010 Program, the CWG worked to change the timing and the timeline for the Book Digitization Initiative to distinguish this program from the Collections Enhancement Awards Program, as there was some confusion for CARLI members between the two in FY2009.

The CWG discussed the evolution of the CARLI Book Digitization Initiative and the process for submission and selecting items for the program. The CWG agreed that making this a more rolling program would work and possibly increase submissions. Further discussions will continue in this area.

**Collections Enhancement Awards Program**

**Peace / Justice / Conflict** was selected as the theme for the Collaborative Digitization / Collection Partnerships section of the FY2010 CARLI Collections Enhancement Awards Program. Themes discussed and/or suggested, which were not selected, will be considered as options for future years.

A subgroup consisting of Mary Konkel, Luann DeGreve, Marlene Slough, and Elizabeth Clarage was formed. This group worked on merging the proposal documents into a single document to simplify the proposal process. The program documentation was reviewed and updated to add a requirement for an abstract for all proposals, and a literature review and research and methodology sections to proposals in the Access & Analysis category.

**Programs**

Luann DeGreve, Katie Maier O'Shea, and Elizabeth Clarage served as the Planning Committee for the CWG Fall 2008 Forum this year. They continued to serve as the CWG members of the joint planning committee between the Collections Working Group and Electronic Resources Working Group for the CARLI E-Book Symposium which was offered in Spring 2009.

The CWG Fall Forum "The New Paradigm of Weeding; and an Overview of the CARLI Collections Programs" was held October 13, 2008 at Heartland Community College. The morning program featured presentations on weeding by CARLI members, and a roll-out of the 2010 CARLI Collections Enhancement Awards Program and the CARLI Book Digitization Initiative. The afternoon featured topical breakout sessions for participants to discussion the two programs. There were approximately 80 people that attended this program.

The jointly hosted, CARLI E-Book Symposium from the Collections Working Group and the E-Resources Working Group was held March 4, 2009 at Hawthorn Suites in Champaign. The symposium provided an overview of the industry from not only a publisher's point of view but also from the user's perspective. CWG Chair, Mary Konkel was one of several presenters to share their experiences working with e-books. Approximately 90 librarians and staff attended the program. The symposium was highly successful, judging from evaluations and the "joint" meeting was certainly a factor in boosting attendance.

In February 2009, a subgroup was formed to work on the Fall 2009 CWG Forum. This group consists of Mary Konkel, Jerry Anderson, Marlene Slough and Elizabeth Clarage.

**Other**

The Library at the University of Illinois at Urbana Champaign conducted an RFP for the selection of a monograph/book vendor. YPB Library Services was selected. Vendor presentations for the UI RFP were scheduled for September 16, 17, & 19, 2008. Heather Parisi, Frances Drone-Silvers and Mary Konkel's reports on these vendor presentations were posted on the CWG Wiki to share key points of the presentations among group members. CARLI is publicizing the pricing that is extended to CARLI member libraries through this proposal. CWG Committee member Lynn Wiley was a key player in this project. The CWG has discussed and will continue to discuss how this product might aid in cooperative purchasing within the state.

On the recommendation from the Collections Working Group, CARLI partnered with SpringShare to offer discounted pricing for LibGuides. Through May 2009, 32 CARLI members have purchased a subscription.

The Collections Working Group's wiki and listserv continues to facilitate collaboration of the Group including drafts of minutes and meeting reports.

The Collections Program web pages, which Elizabeth Clarage maintains, have been very helpful in the electronic tracking of proposals, both current and prior year, and may serve as a best practice model for both libraries considering participation in the program and participants who are working on proposal submissions.
Collections Enhancement Awards Program: http://www.carli.illinois.edu/mem-serv/coll-man/collman-awards.html
CARLI Book Digitization Initiative: http://www.carli.illinois.edu/mem-serv/coll-man/collman-digit.html

Many thanks to CARLI staff liaison Elizabeth Clarage for keeping us administratively on track and in the CARLILand loop and CARLI staff liaison Connie Walsh for her fiscal advice and consortium perspectives.

**Future Plans**

- Continue efforts in continuous improvement, publicity, and rollout of Awards Program and Book Digitization Initiative.
- Continue to explore joint partnerships in program development across the Working Groups with topics of mutual interest.
- Further discussion of making the Book Digitization Initiative a more year round "rolling" program, which may increase submissions and help maintain the flow of OCA digitization.
- The Collections Working Group is holding a strategic planning meeting in June 2009.

Submitted June 1, 2009
Mary S. Konkel
Chair, Collections Working Group

**Digital Collections Users' Group**
**Report Of Activities, 2008–2009**

**Members:**
Matthew Cook (2007-2009), Illinois Institute of Technology, **Chair**

Ellen Corrigan (2009-2011) Eastern Illinois University
Kevin Ford (2008-2010), Columbia College Chicago
Ginger Frere (2009-2010), Newberry Library
Betsy Kruger (2009-2011), University of Illinois at Urbana-Champaign
Michel Nguessan (2007-2010), Governors State University
Julie Patton (2009-2011), Northwestern University
Sue Wilson (2006-2009), Illinois Wesleyan University

Staff Liaisons: Jessica Gibson and Amy Maroso

**Communication**

> The DCUG meets monthly by conference call and twice a year in person.

- The DCUG uses e-mail and an internal wiki to work collaboratively on materials between meetings.
- A public wiki serves the CARLI community interested in or working on digital collections.

**Accomplished Tasks**

- Interface Subcommittee created a list of desired features and functions for a redesigned CARLI Digital Collections website (http://collections.carli.illinois.edu). In response, CARLI hired a consultant to work on improving the interface. Work started in early 2009 and will conclude in Summer 2009. The redesigned site will feature increased functionality (e.g. browsing by topics, featured images) and a modern look  and feel.
- Launched a weekly feature on the CARLI Blog called "Digital Collections Featured Image" which highlights images in the CARLI Digital Collections. This feature is designed to market the collections and promote increased usage of CARLI Digital Collections.
- Launched a weekly feature on the CARLI Blog called "Digitization Quick Tips" featuring how-to's, announcements, and advice for CARLI members interested in digitization and CONTENTdm.
- Standards Subcommittee revised and updated "Guidelines for the Creation of Digital Collections: Digitization Best Practices for Images and Text"
- Hosted two grant writing workshops, one in Springfield on February 24, 2009, and the other in Chicago on March 10, 2009. Alyce Scott, Digital Imaging Program Coordinator at the Illinois State Library conducted both workshops.
- Hosted the first DCUG forum entitled "You Are Not Alone: Digital Projects in Illinois", on July 25, 2008, at the Chicago State University Library. The forum was attended by over 75 people and featured presentations from CARLI libraries that are creating digital projects.

- Assisted the CARLI Office with the testing of a monthly statistics generator that will provide some usage statistics for CARLI Digital Collections.
- Standards Subcommittee finalized "Guidelines for the Creation of Digital Collections: Digitization Best Practices for Audio," which will be posted to the CARLI website for use by CARLI libraries working on audio digitization projects.

**Projects in Progress**
- Planning a forum on digital preservation entitled "Ensuring Enduring Access: A Forum on Digital Preservation" to be co-hosted with the Preservation Working Group. The event will be held July 21, 2009 at the iHotel in Champaign.

**Potential Future Plans**
- Continue to monitor feedback and suggest ways to make the CARLI Digital Collections user experience better.
- Host a forum on Copyright and Rights Management and how they relate to digitization, digital collections, and access to digital repositories.
- Establish a joint subcommittee with the Preservation Working Group on the topic of digital preservation as it relates to CARLI libraries and submit a report and recommendations to the CARLI Board by December 2009.
- Standards Subcommittee will continue to create digitization guideline documents for use by CARLI libraries, including a video digitization best practices document.

Matthew Coook, Chair
Digital Collections Users' Group
Submitted May 22, 2009

**Electronic Resources Working Group**
**Report Of Activities, 2008–2009**

**Membership:**
Jeannette Pierce (2007-2010), Loyola University, Chair

Sara Blaszczak (2006-2009), University of Illinois at Chicago

Linda Carlisle (2009-2011), Southern Illinois University - Edwardsville

Laurie Sauer (2006-2009), Knox College

Chris Sweet (2007-2009), Heartland Community College

Wendy Shelburne (2006-2009), University of Illinois at Urbana-Champaign

Sarah Wessel (2007-2010), Illinois Wesleyan University (served as acting chair while Jeannette was on leave)

Illinois State Library Liaison: Gwen Harrison
CARLI Staff:  Cindy Clennon, David Hamilton

**Highlights of Activity**

**Electronic Resource Proposal Evaluations** – outside of the CARLI database brokering program the ERWG received and reviewed approximately 16 new e-resource proposals. Of these, 4 products were offered directly to the libraries or are available through MLNC.  Work is still being done on 8 of these in anticipation that agreements will result.

**Targeting Resources of Greatest Value - i**n an attempt to ensure that the product offerings negotiated by CARLI are of the greatest value of the membership the ERWG undertook several activities this past year.  This included reviewing the list of most commonly held titles presented in the Statewide Serials Task Force Report and analyzing those titles held by 60 or more libraries.  Of those titles, 69% are included in Academic Search Premier, with varying coverage depth.  Academic Search Premier does not provide current access to two of the most commonly held titles, Science and Nature.  As the task force recommendations included consortial licensing of electronic access to these most commonly held titles we have begun discussions with vendors about a consortial offering for these products.

The ERWG members also created wish lists for their respective libraries.  The products receiving the largest number of votes, along with new products mentioned by the members in the annual interest survey, were included in the pricing requests sent to the vendors in preparation for the spring database subscription cycle.  Once the selection system is closed we will be analyzing the uptake of these newly proposed products.

**Shared Contribution Program** – due to budgetary constraints the funding for the third and final year of the shared contribution program was suspended so no new products were purchased for the consortium membership.

Here is an update on the current cost recovery:

Sage Deep Backfiles    $182,430        81%
2008 Offerings*        $132,940        52*

*This included Black thought & Culture, Historical Statistics of the US, Sage E-Reference, and Women & Social Movements

**Licensing Workshop** – the ERWG hosted a very successful workshop on licensing on November 17, 2008.  The workshop was attended by 95 librarians and included discussions of the key rights libraries need for materials and both good and bad examples of the corresponding license language; educating staff and patrons about license language and licensing work flow.  The post-workshop evaluations were very positive and 62% requested a follow-up session on licensing.  The program proposal is being prepared for an additional licensing workshop to allow more hands-on license review and more discussion of workflow.

E-Book Symposium – In conjunction with the Collections Working Group, the ERWG hosted an e-book symposium, which was held on March 4, 2009 at the Hawthorn Suites in Champaign. The symposium provided an overview of the industry from not only a publisher's point of view but also from the user's perspective. ERWG member Wendy Shelburne was one of several presenters to share their experiences working with e-books. Approximately 90 librarians and staff attended the program.  The symposium was highly successful, judging from evaluations and the "joint" meeting was certainly a factor in boosting attendance.

Jeannette Pierce, Chair
Electronic Resources Working Group
Submitted May 29, 2009

**I-Share Users' Group**
**Report Of Activities, 2008–2009**

**Membership**

Carlos Melian (2006-2009), Northeastern Illinois University, **Chair**

Sarah McHone-Chase (2007-2010), Northern Illinois University, **Chair-Elect**

Carol Reid (2007-2010), Heartland Community College, **Secretary**


Mary Burkee (2009-2011), University of Illinois Urbana-Champaign
Xiaotian Chen (2006-200), Bradley University
Sandy Craig (2009-2011), Illinois Eastern Community Colleges
Keith Eiten (2007-2010), Wheaton College
Stephanie Graves (2006-2009), Southern Illinois University at Carbondale
Alexis Rogers (2009-2010), Lincoln Land Community College
Jason Rossi (2009-2011), Robert Morris University
Stephen Smith (2007-2010), University of Illinois at Springfield

Karen Whisler (2009-2011), Eastern Illinois University


CARLI Staff Liaison: Lorna Engels


The year's work for the I-Share Users' Group (IUG) was marked with numerous activities framed by the discussion and review of the IUG charge and the I-Share Teams' charges.  The revised charges reflect a broad spectrum of issues related to our consortium and member libraries and the accomplishments for 2008-2009 further emphasize our current environment.


A specific discussion that IUG began to promote was related to the "future of the integrated library system (ILS)".  As CARLI moves to a next generation ILS, IUG felt it was necessary to begin a discussion with the I-Share teams and the CARLI staff for further dissemination to member libraries.  The year produced several opportunities to begin this process with the clear implication that we would continue to actively participate in any future developments that fall within the scope of IUG.


As detailed below, the needs of our members are not necessarily Voyager-specific but involve a wide array of issues related to workflows, best practices and instruction.  IUG and the I-Share Teams continue to be committed to assisting libraries and providing information as needs are identified and our consortium evolves.


**Review of Charges**


The last meeting of the year for IUG is traditionally a joint meeting with the I-Share Team chairs to discuss the annual report, current projects and the coming year's activities.  At the June 2008 meeting it became evident that IUG and its teams needed to re-examine their roles and contributions to CARLI and the member libraries.  Many of the teams had moved beyond "the product" and were working with, and providing information for, many issues related to their functional areas that were not necessarily Voyager specific.  IUG was also beginning to examine its charge in a post-Voyager implementation environment and wanted to reestablish its leadership role with the teams and with any future CARLI initiatives.

As a result of these concerns, IUG began discussions with Susan Singleton, Executive Director of CARLI, CARLI staff and each of the I-Share Teams in fall 2008.  After meeting with each team to discuss specific issues and future directions, team charges were revised and submitted to IUG for approval.  IUG finalized this process in late fall 2008.  Concurrently, IUG also began to discuss its charge and responsibilities and presented a revised charge in November 2008, which was subsequently approved by the Board at their December 2008 meeting.  Our hope is that the new charge reflects IUG's commitment to continuous engagement with the I-Share member libraries and CARLI's strategic direction.

**Task Forces**

A number of Task Forces were created during the year to address issues raised by IUG or requested from

I-Share Teams for additional action.

- Ad Hoc Task Force on Statistics and Reports

    To assist member libraries in their annual statistics reporting, IUG created an ad hoc task force to review and update the CARLI annual statistical package and document its content.  The Task Force was also asked to link and document the statistical package in connection to several annual statistics that libraries are required to report (e.g., ACRL annual statistics).  The group completed its work in early 2009 with an extensive document to assist CARLI libraries in their annual statistical reporting (http://www.carli.illinois.edu/mem-prod/I-Share/i-sysdocs/I-network/statspck.html).

- Usability Testing Volunteer Group

    At the request of the I-Share OPAC Team, IUG created a Usability Testing Volunteer Group to assist the OPAC Team and CARLI staff in testing specific elements in WebVoyage and other CARLI supported systems.  The charge was recently completed and a call for volunteers will go out this spring.

- Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (2009)

    ICAT identified the need to review and update the extensive document related to cataloging electronic resources that was created by a previous IUAG task force in 2004 (http://www.carli.illinois.edu/mem-prod/I-Share/cat/archive/040419_cater_final.pdf).  IUG agreed that there have been substantial changes in the electronic resources environment since that time and created a new task force to update existing documentation.  While the charge of the Task Force is focused on cataloging and OPAC displays, it is expected that other issues related to electronic resources in the I-Share environment will surface that may need to be addressed by IUG in the near future.

**Forums/Workshops**

- Liaisons' Forum

    The annual Liaisons' Forum was held in Champaign in May 2009.  The Forum was designed to provide information to Voyager Liaisons on their responsibilities and further communication with CARLI staff and other libraries.  This year's Forum also included an extensive formal discussion related to the "future of the ILS."  IUG hopes that this initial conversation will formalize into more extensive feedback with member libraries.

- IUG Reports Wimba Forum

  Another annual IUG sponsored forum related to report writing with Voyager.  In attempting to address alternative forms of information delivery, IUG held the forum for smaller blocks of time on two separate days using Wimba.  The format was extremely successful and is an excellent option to minimize travel requirements for future educational events.

- Copyright Basics and Library Reserves Workshop

  The all-day workshop was sponsored by both the I-Share Users Group and the CARLI Public Services Working Group with funding provided by the CARLI Program Planning Committee.  The workshop was led by Thomas Lipinski, Co-Director and Associate Professor for the Center for Information Policy Research at the School of Information Studies at the University of Wisconsin and covered a broad range of copyright topics related to libraries, including course reserves.

**Miscellaneous**

- Functional checklists for Voyager upgrade

  During the fall 2008, the OPAC Team created a testing "checklist" in anticipation of the upcoming Voyager upgrade.  IUG felt that similar documentation would be of general benefit and requested that  each functional team prepare a "checklist" for each Voyager client—Acquisitions, Cataloging, and Circulation.  The checklists can be used as needed by member libraries, functional teams and CARLI staff for Voyager upgrades.

- Communication channels

  While not a formal IUG initiative, communication strategies were a prominent note at the Chairs' meeting during the CARLI annual meeting last fall.  IUG considered the need for additional communication as another extension of the dialog we were having with the teams related to their charges.  We have continued this practice during the year, specifically addressing issues identified by I-Share teams and directly involving them in IUG actions.   The IUG Liaisons to each team continued to be extremely active in maintaining a high level of communication with IUG and its teams.

- "Future of the ILS"

  IUG began an informal process of discussing the "future of the ILS" in preparation for any related CARLI initiatives.  We have requested that each I-Share Team also begin informal conversations during the coming year to develop an ongoing dialog within I-Share libraries.  IUG hopes to formalize information gathering in the near future to engage with member libraries and actively participate in critical decisions regarding the next generation ILS.

**IUG Future Objectives**

- Continue the "future of the ILS" discussion and formalize information gathering as CARLI's future ILS direction develops.
- Develop communication processes with I-Share Teams, other CARLI groups, CARLI staff and member libraries. Continue to work closely with I-Share Teams to address critical needs. Review the work of the Cataloging Electronic Resources/Electronic Resources Display in the OPAC Task Force (2009) and identify additional areas for IUG action.
- Monitor the Usability Testing Volunteer Group and refine processes as needed.
- Identify additional areas related to the management of electronic resources and develop strategies for delivering related information to member libraries.

**Summary of Team Activities**

At the request of IUG each functional team reviewed and updated their charge. After discussions between the Teams and IUG, it was agreed that the work of each team is both system and function specific. The revised charges enable each team to be flexible in providing information and assistance to the member libraries, IUG and the CARLI staff in system processes and other broader, related initiatives. IUG approved the revised charges for each of its teams during the fall 2008. Indicative of the revised charges, the list of accomplishments that follow refer to a broader range of work with systems and across functional areas (VuFind and technical services workflow analysis, for example).

Of particular importance is the continued extensive outreach to I-Share and CARLI libraries by all the teams in the form of forums, workshops, Wimba sessions, documentation, etc. to disseminate information and promote communication. Another notable development this year was the effort to work collaboratively with other CARLI groups. While this effort was initially adopted by the IACQ and ICAT teams in their combined request to the CARLI Program Planning Committee last spring for a Workflow Analysis Seminar in fall 2009, it was a consistent theme within IUG in response to conversations during the Chairs' meeting at the CARLI Annual Meeting. In addition to combining limited resources in providing a high level of service, the collaborative process and alternative delivery mechanisms reflects our current professional environment. Additional communication was a theme reported by several of the Teams in connection to the evaluations of their forums and it is clearly a need that requires continued vigilance. IUG will continue to promote these initiatives in addressing member library funding priorities related to travel and the need for continued engagement by libraries across the state.

Following are brief summaries of each Team's annual assessment of their specific activities and future initiatives.

**I-Share Acquisitions & Serials Team (IACQ)**

*Sharon Nelson, Northern Illinois University, Chair*

**Accomplishments**
- Sponsored the Technical Services Workflow Analysis Seminar in conjunction with the I-Share Cataloging & Authority Control Team (ICAT)). The all-day forum on workflow assessment was presented by R2 Consulting on Sept. 10, 2008, in Champaign, IL, following nine months of work and planning on the part of both IACQ and ICAT. The forum was generously funded in full by the CARLI Program Planning Committee, allowing all participants to attend free of charge. Because the topic extended beyond Voyager and I-Share, attendance was opened up to all CARLI libraries. This forum was the keynote event for IACQ and provided a springboard for related programs on workflow redesign throughout the year. These included:
    - Follow-up open conference call to the Workflow Redesign Seminar (Oct. 10, 2008)

        The conference call was open to all CARLI members, whether or not they had attended the seminar, and allowed participants to begin discussions about ideas they had heard at the seminar as well as to share planned and ongoing workflow redesign projects in their libraries.
    - Workflows "mini-forums" held throughout the state: (Chicago, February 3; Greenville, March 18; Bloomington, March 19) Also jointly sponsored with the

I-Share Cataloging & Authority Control Team (ICAT)), these sessions were intended to enable library staff to come together for an afternoon of focused conversations on this topic.

- Participated in the ICAT Spring 2009 forum including a panel discussion on workflow redesign (which served as the capstone to the "workflows" theme for the year), and via a series of "table topics".

- Revised the IACQ Team Charge

    At the request of IUG, IACQ revised its charge to enlarge its responsibilities beyond the charge's original, product-centered, focus. The revised charge now enables IACQ to share expertise and communicate issues, concerns, best practices, innovations, and emerging trends in acquisitions and serials librarianship in general to the CARLI membership and/or governing bodies, instead of only those issues most directly affecting I-Share and Voyager.

- Developed a new Acquisitions/Serials FAQ for the CARLI wiki

    The FAQ was developed from reviewing comments made on last year's survey of I-Share libraries about their use of Voyager Acquisitions, and from the CARLI Office's database of support requests. From this information the team put together a list of frequently asked questions (and common misperceptions) about using Voyager Acquisitions and Serials in the I-Share environment. While this project was originally intended to be the basis of the December 2008 open conference call, the team decided the information collected would be more useful as a written resource. Soliciting updated topics for the Acq/Ser FAQ is now a permanent agenda item for each IACQ monthly meeting.

- Completed a Voyager 7 upgrade "script"/checklist for Acquisitions & Serials

    At IUG's request, IACQ prepared a 10-page document describing current and post-upgrade expected Acquisitions and Serials functionality.

**Future Objectives**

Two projects on the team's initial goals for 2008-09 have been postponed until after the Voyager 7 upgrade. These are "Getting Started with EDI," and a review of Complex Publication Patterns. Both topics will be developed so they can be presented via Wimba and/or conference call.

The team has also decided to postpone the annual Acquisitions/Serials forum from its "traditional" fall slot until spring 2010. Since the team would have to commit to a fall forum by May 2009, postponing it will enable IACQ to address any issues arising from the June 2009 Voyager 7 upgrade, and to best align potential forum topics with member libraries' needs (with travel budgets being slashed throughout the state, the forum should be as informative, useful and compelling as possible to make attendance worthwhile). Another advantage in postponing the forum is that the several new members who will be joining IACQ in July 2009 can be involved in the forum planning process from start to finish, instead of being brought in "mid-stream."

In June 2009, Anne Hudson of the CARLI Office will host the first-ever "H-Acqfest," a day devoted to advanced work on and analysis of acquisitions and serials queries and reports. Several IACQ team members are registered to attend.

**I-Share Cataloging & Authority Control Team**
*Cason Snow, Northern Illinois University, Chair*

**Accomplishments**
- Planned and implemented two educational forums, in conjunction with IACQ, for I-Share catalogers. All of the forums were well attended.
- Presented joint program with IACQ, "Technical Services Workflow Analysis" September 10, 2008, Hilton Garden Inn, Champaign. R2 Consulting, a workflow consulting firm, presented basic information on how a library could begin to analyze workflows.
- Assisted IACQ with mini-forums held across the state as a follow up to the R2 workshop; these events were held February 3 in Chicago; March 18 in Greenville; and March 19 in Bloomington.
- "Spring Forum" April 30, 2009, University of Illinois Springfield.

  The morning presentation focused on the upgrade to Voyager 7. The afternoon panel discussion examined technical services workflow analysis. Breakout sessions discussed new views of data in next generation public catalogs, and a wide range of topics focused on Acquisitions and Serials.
- Reviewed the charge of the group and submitted recommendations to IUG. The main changes were to emphasize metadata and collaboration with other teams.
- At the request of CARLI staff, drafted recommendations for specific bibliographic record data elements to be used with "reduplication" for searches performed using VuFind. This "reduplication" process improves the precision of the search results. The recommendations were accepted for possible future enhancements to the VuFind interface.
- Made recommendations on the new 996 field per OCLC's revised Record Use Policy statement.

**Future Objectives**
- Planning fall forum with subject and venue TBD. The team polled attendees of the Spring Forum for in person or online meeting desirability. Poll results showed a slight preference for online meeting.
- Assist the CARLI Office with educational efforts regarding new cataloging functionality in Voyager 7.
- Monitor developments in the pending release of Resource Description and Access (RDA), and establish contact with Illinois OCLC Users Group (IOUG) to explore possible collaborative efforts for training and other preparation for the implementation of RDA.
- Monitor the Program for Cooperative Cataloging response to the Library of Congress decision to end tracing of series, and update I-Share cataloging recommendations to reflect the PCC series tracing recommendations.
- Participate in Cataloging Electronic Resources/Electronic Resources Taskforce (2009)

**I-Share Instruction Team**
*Randi Sutter, Heartland Community College, Chair*

**Accomplishments**
- Using Social Technologies in Library Instruction Forum – April 2, 2009
- The Instruction Team organized a social technologies forum held at the University of Illinois, Springfield that included panel discussion on LibGuides and breakout sessions

covering the use of different social technologies in library instruction. Topics included the use of wikis, clickers and other Web 2.0 tools. Over 80 participants attended the forum. Evaluation results were positive overall.

- Tutorial Workshops – June 5, 2009 at CARLI and June 12, 2009 at Columbia College

  In previous years, the I-Share Instruction Team has created and modified online tutorials for the I-Share catalog. The reality of multiple OPAC interfaces and individual catalogs at each institution make tutorials created for only the classic version of the shared catalog less useful for libraries than they may have been in the past. The Team perceived a need for training for

  I-Share librarians that would empower them to develop their own local online tutorials. With these considerations in mind, the Team focused its energy on educating members about the best practices of tutorial scriptwriting and storyboarding, and introduced free, open-source screencasting software via two hands-on tutorial creation workshops.

## Future Objectives

- Because of the overwhelming response to the Online Tutorial Creation Workshops (with over 25 individuals on waitlists) future workshops will be planned in the coming year.

## I-Share OPAC Team

*Jonathan Gorman, University of Illinois at Urbana-Champaign; Amanda Pippitt, Millikin University, Co-Chairs*

## Accomplishments

- "Text me this call number" feature enabled in both WebVoyage and VuFind in both Universal and Local catalogs as an opt-out feature. Originally it was an opt-in since it was thought libraries might be concerned about possible abuse. However, overwhelming requests for implementation lead to a change to opt-out. At this time there are only 4 libraries who have not requested this feature.
- The appearance and functionality of links within the catalog to services like Google Books and Syndetics were discussed pretty heavily.
- WebVoyage and VuFind links to Google Book using Google Books API. Feature had to be disabled in both WV and VuFind but has since been re-enabled in VuFind.
- Format icons created and enabled in VuFind.
- Approved a number of minor improvements and corrections to the display of bibliographic data in both WV and VuFind.
- Reviewed and edited OPAC team charge for IUG.
- Reviewed and updated team priorities list at: www.carli.illinois.edu/comms/iug/iug-opac/iug-opac-reports/opac-tasklist.html
- Acted as VuFind advisory, acting as clearinghouse for concerns, questions, & suggestions.
- Documentation of code/"Search box generator" created for libraries to make customized WebVoyage search boxes to embed in library webpages.
- Completed and posted final WV test script. This project has inspired requests to other teams to create similar testing scripts for other Voyager modules.
- Reviewed VuFind FAQ.
- Usability testing: creation, editing, and submission of "draft of process for usability testing" to IUG. Created an initial list of issues/problems for usability testing (posted to team wiki).

**Future Objectives**

- Work to improve EndNotes/Refworks import from WebVoyage.  A proof of concept for Refworks Direct has been created and information on the approach will be summarized in a report early this summer.
- Preparing for WebVoyage 7.0 upgrade this June 2009 and revise customization guidelines document
- Keeping an eye on Twitter applications for OPACs.
- Recommend further VuFind improvements in response to 1.0 release.
- Begin actual usability testing process in conjunction with Usability Testing Volunteer Group
- Continue discussion of future ILS (as concerns OPAC-related needs) with the consideration of 3 areas:
    o Service(s) we would like to provide but our current ILS doesn't accommodate [blue sky stuff]
    o Annoying functionalities/assumptions/requirements in our current system [distinct from limitations]
    o Functionalities in our current system that we think our users or we couldn't do without.


**I-Share Resource Sharing Team**
*Dallas Long, Illinois State University, Chair*


**Accomplishments**

- Offered two WIMBA sessions on best practices for resource sharing for distance education students.
- Provided circulation and callslip test scripts for future upgrade versions of Voyager
- Revised team charge to include advisory role for products supported by CARLI other than Voyager


**Forums**

A fall forum was planned with two topics.  A morning session was planned on managing Electronic Course Reserves through different products used by I-Share libraries, and an afternoon session was planned on privacy and confidentiality issues in resource sharing.

However a sufficient number of presenters could not be recruited so it was decided to postpone the topics and consider developing them in the future as WIMBA sessions.


**Future Objectives**

- Considering recommendations for language changes to patron blocks in the OPAC so the language is more helpful and explanatory for patrons.
- Review plans for the postponed Fall Forum and consider again for spring.
- Provide feedback for potential WIMBA sessions regarding feature changes and fixes in newest Voyager upgrade.


*Respectfully submitted,*
Carlos Melian,
Chair, I-Share Users' Group
June 2, 2009

**Public Services Working Group**
**Report Of Activities, 2008–2009**

**Members:**
Dave Green (2007-2010), Northeastern Illinois University, **Chair**
Sarah Laaker (2007-2010), John Wood Community College, **Chair-Elect**

Anne Armstrong (2006-2009), University of Illinois at Chicago
Kelly Fisher (2007-2010), Eureka College
Lisa Janicke Hinchliffe (2008-2011), University of Illinois at Urbana-Champaign
Greg MacAyeal (2006-2009), Northwestern University
Susan Tulis (2008-2011), Southern Illinois University Carbondale
Michele Ukleja (2008-2011), William Rainey Harper College
Dane Ward (2006-2009), Illinois State University

Staff Liaison: Elizabeth Clarage and Jennifer Masciadrelli

**FY 2009 Timeline of Events:**

10/24/2008: Breakfast meeting of Chairs of CARLI Committees, Working Groups, Users' Groups, and Teams
5/22/2009: Regional Open Houses at Illinois State University and Heartland Community College
5/29/2009: Regional Open Houses at Quincy University and John Wood Community College
6/24/2009: Regional Open House at Northwestern University

**Narrative:**
In order to determine what the committee would focus on this year, the group spent considerable time in initial meetings reviewing their charge, feedback from previous CARLI workshops and meetings and public service issues common to all member libraries. From the first two meetings, a list of important issues and themes of concern to public services were developed, including:

1. Programs focusing on electronic resources acquired by CARLI (WebFeat, VuFind, WorldCat Local Project)
2. E-reserves (including copyright implications and handling problems with patrons)
3. Suggestion to revisit topics that arose from last year's CARLI PSWG sponsored IACRL Pre-conference (notes were distributed to the group from the IACRL pre-conference)
4. Doing away with reference desks, merging circulation and reserves and the overall idea of where we should go with our organizational structures
5. Sharing ideas about what libraries are doing (through fieldtrips/showcases)
6. Textbook policies
7. Information literacy core course, credit courses
8. Embedded librarian: how the library can support the online learner

9. Rethinking library policies in general to suit the changing needs of users (this could be an umbrella theme including textbook policies, cell-phone policies, and any other service or policy that could be reengineered to better suit user needs and expectations)
10. University of Rochester Anthropology study: the ethnographic study conducted at the University of Rochester to study how people really do research. A few Illinois schools have won an LSTA Grant to conduct a similar study assessing user needs and expectations.
11. Connecting 9 and 10 above: How we need to rethink our approaches to various services and practices based on the data from the upcoming member LSTA Grant.

In subsequent meetings, many members felt it was time to experiment with a new venue for member libraries to share information, ideas, and discuss issues. There was strong support from everyone that it was time to try scheduling "road trips" to select libraries who would host open houses to support discussion and the exchange of ideas.

The "open house" idea included these considerations: 1. We would not want CARLI to schedule things on the same date. 2. We want to have institutions in different geographical areas of the state. 3. We may want to try to find "cutting edge" libraries. 4. We should not try only to find the best of the best—building community is also important. 5. Libraries could address issues that they are struggling with and what they are doing to address them. 6. A series of three days (with a possibility of more than one location on a date) seems do-able. 7. Discussed if this would need to go to the program planning committee for funding. 8. Smaller institutions may have innovative programs as they don't have as many resources.

A subcommittee of three members, Lisa Hinchliffe, Sarah Laaker, and Susan Tulis, with help from Elizabeth Clarage, volunteered to work out the details of the plan and present it to the committee at the next meeting. From their recommendations and fine work, the committee set about organizing open houses in three distinct geographic areas of the state. The goals of these open houses were:
1. Build community
2. Discover new resources
3. Build a program that highlights the participation and contributions of the smaller institutions
4. Share ideas
5. Sharing information on work practices
6. Discover new services or new ways to implement traditional services
7. Draw people from institutions that don't normally participate

As of the time of this writing, the results are not yet known how effective this new venue is. As requested by the CARLI Program Planning Committee, the PSWG is planning on small focus groups of some of the attendees of the Regional Open Houses in additional to the traditional paper evaluations. However it turns out, I am greatly appreciative of this committee's willingness to try new and innovative ideas.

In a carry-over of planning from FY2008, the PSWG in conjunction with the I-Share Users Group sponsored a workshop, "Copyright Basics and Library Reserves." This program was held at the Student Center on the University of Illinois at Chicago campus on March 20, 2009.

**Future Planning:**

As can be seen in an earlier section of this report, there are many potential issues and themes of concern that could be pursued this coming year in the format of a workshop, conference, or even more open houses. One possibility for next year is holding a one day conference on the results of the anthropology research project which is being done in Illinois. Also, after the open houses are all completed and they are assessed, other ideas and opportunities may arise.

Respectfully submitted,

Dave Green, PSWG Chair 2008-2009

May 31, 2009

**Preservation Working Group**
**Report Of Activities, 2008–2009**

**Members:**

Lynne M. Thomas (2008-2011), Northern Illinois University, **Chair & Chair-Elect**

Kathy Boyens (2006-2009), Olivet Nazarene University
Lynn Daw (2009-2011), Monmouth College
Kim Hale (2007-2010), Columbia College Chicago
Anne McKearn (2007-2010), Aurora University
Alyce Scott (2006-2009), Illinois State Library
Jennifer Hain Teper (2008-2011), University of Illinois at Urbana-Champaign
Staff Liaison: Elizabeth Clarage

**Activities:**

- Continued to maintain and update the Preservation Webliography that is available on the CARLI website:
  http://www.carli.illinois.edu/mem-serv/coll-man/collman-pres/pres-weblio.html
- Publicized the Webliography in the CARLI Newsletter
- Provided preservation-related tips and articles for the CARLI Newsletter and blog, on the topics of Mold, Tape, ILL, and Preservation Blogs
- Organized a Disaster Recovery Program to be held June 9 & 11, 2009, which will feature a Book Burn Simulation and Recovery session in conjunction with the Illinois Fire Service Institute, along with a discussion of building a disaster plan for CARLI members.
- Two members of our committee (Jennifer Hain Teper and Alyce Scott) served on the statewide group that planned, submitted, and received an IMLS Connecting to Collections Grant for statewide preservation planning.
- Planned an Audiovisual Preservation forum, to be held in Chicago at Columbia College on October 13, 2009.
- Planned, in conjunction with the Digital Collections Users Group (DCUG), a Digital Preservation forum, to be held in Champaign, IL on July 21, 2009.
- The Working Group has also begun brainstorming additional avenues for promoting preservation work in CARLI libraries.

**Future Activities:**

- Establish a joint subcommittee with Digital Collections Users' Group on the topic of digital preservation as it relates to CARLI libraries and submit a report and recommendations to the CARLI Board by December 2009.

Respectfully Submitted,

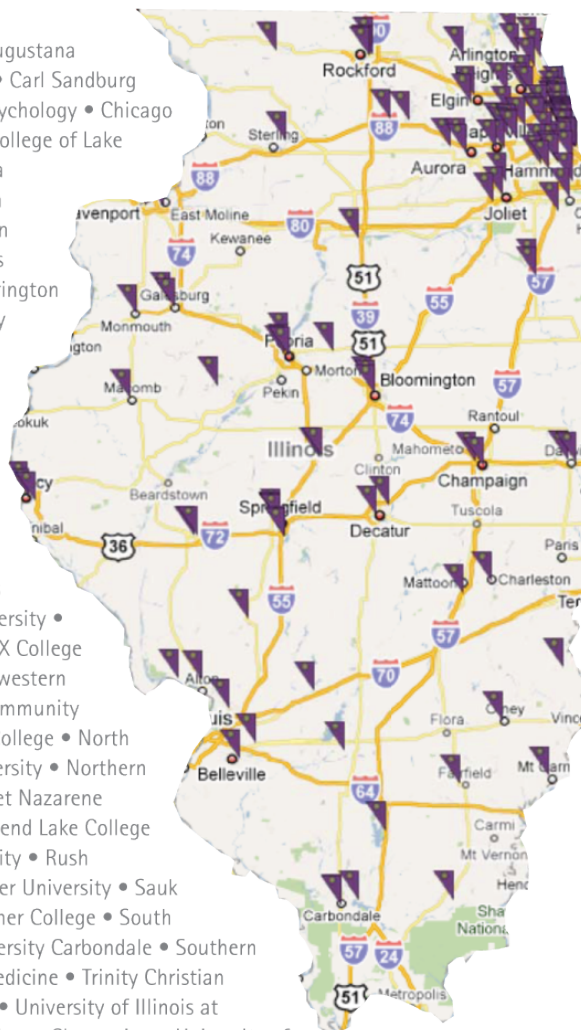Lynne M. Thomas
Northern Illinois University
Chair, CARLI Preservation Working Group
June 1, 2009

# CARLI Members

## Governing Members

Adler School of Professional Psychology • Argosy University/Chicago • Augustana College • Aurora University • Benedictine University  Bradley University • Carl Sandburg College • Catholic Theological Union • Chicago School of Professional Psychology • Chicago State University • Chicago Theological Seminary • College of DuPage • College of Lake County • Columbia College • Concordia University Chicago  Danville Area Community College • DePaul University • Dominican University • Eastern Illinois University • Elgin Community College • Elmhurst College • Erikson Institute • Eureka College • Field Museum of Natural History • Governors State University • Greenville College • Harold Washington College • Harrington College of Design • Heartland Community College • Highland Community College • Illinois Central College • Illinois College • Illinois College of Optometry • Illinois Eastern Community Colleges • Illinois Institute of Art - Chicago • Illinois Institute of Technology • Illinois Math and Science Academy • Illinois State Library • Illinois State University • Illinois Valley Community College   • Illinois Wesleyan University • JKM Library Trust • John A. Logan College • John Wood Community College • Joliet Junior College   • Judson University • Kankakee Community College • Kaskaskia College • Kendall College • Kishwaukee College • Knox College • Lake Forest College • Lake Land College • Lewis and Clark Community College • Lewis University • Lincoln Christian University • Lincoln Land Community College • Loyola University Chicago • Malcolm X College • McKendree University • Meadville-Lombard Theological Seminary  Midwestern University • Millikin University • Monmouth College • Moraine Valley Community College • National-Louis University • Newberry Library • North Central College • North Park University • Northeastern Illinois University • Northern Illinois University • Northern Seminary • Northwestern University • Oakton Community College • Olivet Nazarene University • Parkland College • Principia College  • Quincy University • Rend Lake College • Richard J. Daley College • Robert Morris University • Roosevelt University • Rush University • Saint Francis Medical Center College of Nursing • Saint Xavier University • Sauk Valley Community College • School of the Art Institute of Chicago • Shimer College • South Suburban College • Southeastern Illinois College • Southern Illinois University Carbondale • Southern Illinois University Edwardsville • Southern Illinois University School of Medicine • Trinity Christian College  Trinity International University • Triton College • United Library • University of Illinois at Chicago • University of Illinois at Springfield • University of Illinois at Urbana-Champaign • University of Saint Francis • University of Saint Mary of the Lake Mundelein Seminary • VanderCook College of Music •    Waubonsee Community College • Western Illinois University • Wheaton College • William Rainey Harper College

## Associate Members

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## Basic Members

Christian Life Colleg • DeVry University • Ellis University • Fox College Institute for Clinical Social Work • John Marshall Law School • Knowledge Systems Institute • Lexington College  • Midstate College • Northwestern College • Prairie State College • Saint Anthony College of Nursing • Saint Augustine College • Southern Illinois University-School of Law • Taylor Business Institute • Trinity College of Nursing