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

Formed in 2005

Three organizations came together!
ILCSO, CCMP and IDAL
Consortium of Academic and Research Libraries in Illinois
134 member libraries

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

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

- Governing membership FTE: 556,917
- Faculty and staff: 177,266
  734,183
Governing members:

- Annual membership fees range from a minimum of $1,655 to a maximum of $11,038
- Not-for-profit institutions
- Vote for board members
- Eligible for all services
- Staff may serve on committees

Affiliate members:

- Annual membership fee is $573
- Eligible to participate in CARLI email discussion lists
- May attend CARLI workshops, training events and forums

Two UIUC library students stand just outside of the Library School Library, holding stacks of books.
The Consortium leads Illinois academic libraries to create and sustain a rich, supportive, and diverse knowledge environment that furthers teaching, learning, and research through the sharing of collections, expertise, and programs.
WHY?

• The consortium is stronger when all libraries leverage their strength...
• Only you can shape CARLI
• It’s your responsibility to be part of the organization (we are YOU!)
• Get inspired
• Learn about other schools’ students (they may be yours someday)
• We need you!
CARLI COMMITTEES

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

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

Task Forces
• I-Share Next Task Force
<table>
<thead>
<tr>
<th>Name</th>
<th>Constituency</th>
<th>Term</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anne Craig</td>
<td>Ex Officio</td>
<td></td>
<td>CARLI</td>
</tr>
<tr>
<td>Jim Cubit</td>
<td>Private Institutions</td>
<td>2016-2017</td>
<td>Lake Forest College</td>
</tr>
<tr>
<td>Richard Darga</td>
<td>Public Universities</td>
<td>2014-2017</td>
<td>Chicago State University</td>
</tr>
<tr>
<td>Cate Kaufman</td>
<td>Community Colleges</td>
<td>2016-2019</td>
<td>Illinois Central College</td>
</tr>
<tr>
<td>Dennis Krieb</td>
<td>Community Colleges</td>
<td>2015-2018</td>
<td>Lewis and Clark Community College</td>
</tr>
<tr>
<td>Tammy Kuhn-Schnell</td>
<td>Community Colleges</td>
<td>2014-2017</td>
<td>Lincoln Land Community College</td>
</tr>
<tr>
<td>Felice Maciejewski</td>
<td>Private Institutions</td>
<td>2014-2017</td>
<td>Dominican University</td>
</tr>
<tr>
<td>Greg McCormick</td>
<td>Ex Officio</td>
<td>2016-2019</td>
<td>Illinois State Library</td>
</tr>
<tr>
<td>Lydia Morrow Ruetten</td>
<td>Public Universities</td>
<td>2016-2019</td>
<td>Governors State University</td>
</tr>
<tr>
<td>David Stern</td>
<td>Private Institutions</td>
<td>2015-2018</td>
<td>Saint Xavier University</td>
</tr>
<tr>
<td>Dane Ward</td>
<td>Public Universities</td>
<td>2016-2017</td>
<td>Illinois State University</td>
</tr>
<tr>
<td>Frances Whaley</td>
<td>Community Colleges</td>
<td>2016-2017</td>
<td>Illinois Valley Community College</td>
</tr>
<tr>
<td>John Wilkin</td>
<td>Public Universities</td>
<td>2015-2018</td>
<td>University of Illinois at Urbana-Champaign</td>
</tr>
</tbody>
</table>
CARLI is a unit of System Offices under Executive Vice President and Vice President for Academic Affairs, Dr. Barbara Wilson

- CARLI employees are University of Illinois employees
- University of Illinois provides:
  - Staff salaries, benefits
  - HR and legal counsel support
  - Purchasing, licensing and contracting support
  - Desktop computer support and network services
- CARLI is bound by the rules and regulations of the University as a state funded institution
  - Purchasing, procurement and auditing
  - Competitive bidding
  - Recruitment and personnel policies
25 employees
THOSE WHO CAME BEFORE YOU…

• Signed a Membership Agreement with CARLI
• May have signed an I-Share Participant Institution Agreement
• May have served on the Board or CARLI committees or task forces…

There is a history for most institutions with CARLI!
INTERVIEWS WITH CARLI DIRECTORS WHEN I STARTED

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

Midwestern University
THEMES THAT EMERGED

I-Share

CARLI Staff

E-resources management

Most valued for CARLI members!
I-Share is the most valued service

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

• Resource sharing benefits impact all Illinois residents

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

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

Eastern Illinois University
• CARLI staff act as surrogate staff for libraries so that they can focus on supporting their users and collections.

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

• **CARLI frees dollars within each member organization to do mission-critical work.**
The e-resources brokering service is extremely valuable!
• The substantial bargaining power of 128 Governing libraries
• Centrally negotiated and managed license agreements
• Single consolidated invoice for multiple subscriptions
• Multi-year agreements, which give libraries greater cost predictability
• Discounts of at least a 10% discount (usually much greater)
• Capped annual price increases--an average of 5%, which is extremely rare for e-resources
• Libraries LOVE the selection system!
The leveraging of dollars locally is tremendously important.

I-Share members can spend their budgets more strategically.
“The relatively modest investment the State of Illinois and members make impacts \textit{millions} statewide.”

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

“Our library’s staff is as lean as it can be. CARLI staff make the difference!”

“We are all one CARLI library!”

“CARLI has tremendous potential to coordinate strategic best practices.”
And finally…

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

Trinity International University
What does CARLI do?
• Centralized automated systems
  – I-Share (Voyager integrated system)
  – SFX link resolver
  – CARLI Digital Collections

• E-resources
  – Subsidized core electronic resources
  – Database brokering
  – Perpetual access acquisition
    (subsidized and one-time purchase)

• Training, continuing education and support for research

• Physical delivery service

• SUPPORT YOUR LIBRARY!
• Online catalog and integrated library system (ILS) for 86 CARLI libraries
• More than 14.1 million unique bibliographic records
• More than 36.1 million items
• 1,726,905 items circulated in FY16
• Participating libraries share their collections
• Shared centralized integrated library system
  – Runs on hardware operated by CARLI staff
  – Shared software license (Ex Libris Voyager)
• Resource sharing
  – I-Share library patrons able to borrow from all I-Share libraries; remotely and onsite
  – 336,267 transactions among institutions FY 2016
• CARLI staff provide, implementation, help desk service, data loading and reporting services to participating libraries
• I-Share libraries collaborate to share ideas and skills
Program Purpose:

to make it possible for CARLI members to expand and enhance their library collections with both subscription and perpetual access to electronic resources in a more efficient and affordable manner
• For subscriptions and purchased resources
  – CARLI determines the level of interest among member libraries
  – Negotiates discounted pricing
  – Manages the license and invoicing functions
  – CARLI passes on 100% of the negotiated discounts to the subscribing member

• The provision of brokered and purchased E-resources is CARLI’s largest and most widely used service.
  – 2 annual selection cycles: Fiscal Year (April/May) and Calendar Year (Oct/Nov)
  – 126 member libraries purchased at least one database
  – Current Subscriptions being managed by CARLI

<table>
<thead>
<tr>
<th>Term</th>
<th>Number of Subscriptions</th>
<th>Dollar Value of Subscriptions</th>
</tr>
</thead>
<tbody>
<tr>
<td>CY17</td>
<td>706</td>
<td>$8,095,789</td>
</tr>
<tr>
<td>FY17</td>
<td>3,746</td>
<td>$8,571,887</td>
</tr>
<tr>
<td>TOTAL</td>
<td>4,452</td>
<td>$16,667,676</td>
</tr>
</tbody>
</table>
• CARLI-supported CONTENTdm
  – 239 collections
  – Over 195,000 images and 2 terabytes of information
  – 40 institutions participate

• Digital Public Library of America (DPLA)
  • Illinois Digital Heritage Hub
  • Index of CARLI’s and Illinois State Library’s IDA digital images now, more later

• Book Digitization Initiative
  – Member of the Open Content Alliance since 2008
  – Subsidized digitization of 7,943 books, 2,770 folios and 4,618 foldouts
  – 1,891,104 pages digitized
  – 45 institutions contributed at least one collection
ILLINOIS LIBRARY DELIVERY SERVICE (ILDS)
• 141 locations with over 37,000 scheduled stops per year
• Over 2.2 million items transported in FY 2016 for an average cost of $.28 per item.
• Materials travel between any 2 ILDS participants within 24 hours statewide
• The Secretary of State/Illinois State Library provides grant funding for ILDS, with management support from CARLI
CARLI OFFICE PROVIDES SUPPORT FOR LIBRARY OPERATIONS

- “Help Desk” and online problem reporting/resolution
- Support for subsidized e-resources
- Centralized vendor negotiation and contracting
- Centralized database brokering
- Consolidated central billing
- Network & system administration
- Database administration
- Software development
- Data analysis and usage statistics
- Statewide physical delivery
- Digital image repository
- Training for programs and services
- Professional education opportunities for staff
- Staff development through statewide committee service
- Representation to state, regional, national, and international organizations
Chief Financial Officer Connie Walsh and her team
- Oversees CARLI budget & prepares budget documents for Board
- Facilitates procurement process for purchases and contracts
- Ensures single, consolidated invoicing for libraries and vendors

Associate Director CARLI Membership and Communications Margaret Chambers and her team
- Manages communications with CARLI membership and the CARLI Board
- Plans events such as the Annual Meeting, the Board Meetings, and the New Directors’ Institute
- Manages website and email lists

Director CARLI System Services Brandon Gant and his team
- Consortial Commercial Services: Voyager/Oracle, SFX, CONTENTdm
- Consortial Open-Source Services: VuFind, eXtensible Catalog, Archon, REPOX
- Consortial Custom Services: Illinois Delivers, Web Reports, Selection System, Work Requests
- Enterprise Infrastructure: VMware, Dell, Pure Storage, QLogic, HP Networking, F5 Networks
ON OUR HORIZON

- Budget
- Strategic plan
- Search for a next-generation ILS
- Open Textbook Network collaboration
- DPLA
What is the value proposition for CARLI?
**FY16 CARLI Libraries' Investments and CARLI's Value**

**Total spent with CARLI** includes CARLI membership fee, I-Share assessment fee (if applicable), subsidized products and services, and brokered products and services (pass-through costs).

**Estimated value of services** includes single online catalog and enterprise system shared by 86 libraries, subsidized databases, full-price brokered databases with negotiated discounts, and staff time.
WE’D LOVE TO HEAR FROM YOU!

Call any of us anytime!
We are here for you!!!

Phone 217-244-7593 or 866-904-5843
Email: support@carli.illinois.edu
Website: http://www.carli.illinois.edu