CARLI

2017 ANNUAL MEETING

CARLI BOARD OF DIRECTORS, 2017-2018		
Richard Darga	Chair	Chicago State University
Jeff Douglas	Private Institutions	Knox College
Cindy Fuller	Private Institutions	Millikin University
Cate Kaufman	Community Colleges	Illinois Central College
Dennis Krieb	Community Colleges	Lewis and Clark Community College
Tammy Kuhn-Schnell	Community Colleges	Lincoln Land Community College
Taran Ley	Public Universities	Southern Illinois University School of Medicine
Michael Lorenzen	Public Universities	Western Illinois University
Cathy Mayer	Private Institutions	Trinity Christian College
Greg McCormick	Ex Officio	Illinois State Library
Lydia Morrow Ruetten	Public Universities	Governors State University
David Stern	Private Institutions	Saint Xavier University
Frances Whaley	Community Colleges	Illinois Valley Community College
John Wilkin	Public Universities	University of Illinois at Urbana-Champaign

2017 ACRL EXCELLENCE IN ACADEMIC LIBRARIES AWARD

Columbia College Library

CARLI BY THE NUMBERS

134 member libraries

- **Governing members:**   **128**
  - o   Public universities: 13
  - o   Community colleges: 39
  - o   Private, research, and special: 76
- **Affiliates (for-profit institutions):   6**

CARLI member libraries serve 92% of Illinois higher education students, faculty and staff.

THE YEAR IN REVIEW

- I-Share
    - New I-Share Libraries
    - Web Reports
    - New VuFind
    - I-Share Next
- DPLA/Illinois Digital Heritage Hub
- Committee projects
- Listening Sessions
- Directors' Webinar Series
- Budget
- E-Resources
- CARLI's value
- ILDS

Newberry Library
Curt Teich Postcard Archives Digital Collection

WELCOME! NEW I-SHARE LIBRARIES IN 2018

I-Share will Include 90 Libraries in Spring 2018!

VOYAGER WEB REPORTS

- Web-based Voyager reporting tool built by CARLI staff
- Allows you to run a growing set (100+) of CARLI's Voyager reports without installing an ODBC client or MS Access, or learning to write queries
- Simply request a CARLI Oracle account through WRO
- https://wro.carli.illinois.edu/
- Curious? See the **handout in your packet** and watch a short introductory video at
- https://www.youtube.com/watch?v=YobvxwtIBIU&feature=youtu.be

VUFIND

- CARLI has been running our own modified version of the open source VuFind code for almost 10 years
- We have been working to get back to the standard version to take advantage of the broader community's development
- VuFind will continue to be CARLI's default interface to the I-Share Next catalog
- I-Share libraries can make the new VuFind available to their users now
- Libraries must move off the current version of VuFind by the time we launch I-Share Next
- See the **handout in your packet** for more information on the new VuFind!

I-SHARE NEXT

- Selected product will ultimately replace all Voyager staff components and SFX
- New VuFind will be the default public interface; we are not planning to buy a discovery service/public catalog interface
- Chosen product will better support electronic library collections; leverage consortial setup
- RFP still under review by State Purchasing Officer
- Anticipate a 2+ year process from RFP release through full implementation

CARLI
I-Share

I-SHARE NEXT TASK FORCE

Pat Boze, Illinois State Library

Cindy Fuller, Millikin University

Tom Goetz, Harper College

Tammy Kuhn-Schnell, Lincoln Land Community College

Tami Luedtke, DePaul University

Michael Norman, University of Illinois Urbana-Champaign

Matthew Short, Northern Illinois University

Suzanne Wilson, Illinois Wesleyan University

and…

Anne Craig, Kristine Hammerstrand, Connie Walsh and Ted Schwitzner of the CARLI staff

DIGITAL PUBLIC LIBRARY OF AMERICA

Illinois DPLA Service Hub=Illinois Digital Heritage Hub

- Collaborative venture among ISL, CARLI, CPL & UIUC
- Thank you ISL: $10,000 Hub fee; project staff at UIUC
- CARLI staff support REPOX harvester
- Harvest of **228,000**+ metadata records, including:
    - o CARLI Digital Collections
    - o ISL's Illinois Digital Archives
    - o Chicago Public Library & Chicago History Museum
- Metadata Best Practices for the IDHH are available!
  https://ildplametadatawrkgrp.wordpress.com/
- IDHH/DPLA page for CARLI members
  https://www.carli.illinois.edu/products-services/contentdm/dpla

COMMITTEE PROJECTS AND TASK FORCE WORK

- Excellent work!
- Spectrum of projects, services, and diverse institutions
- Uniting CARLI member libraries' staff

University of Illinois at Chicago
Illinois Training School for Nurses, 1890-1900

CARLI DIRECTOR LISTENING SESSIONS, JULY-SEPTEMBER 2017

- **Illinois State Library**

- **Pritzker Military Museum and Library**

- **Lake Forest College**

- **Western Illinois University**

- **Knox College**

- **Illinois Valley Community College**

- **Olivet Nazarene University**

- **Southern Illinois University Edwardsville**

Thank you host locations!

University of Illinois at Chicago
Century of Progress World's Fair,
1933-1934

LISTENING SESSIONS, CONTINUED

Why listening sessions?

- Useful to know member needs
- Even though CARLI cannot do everything, trends should be identified
- Affirms where CARLI is on the right track
- Points out where CARLI needs to communicate

University of St. Francis
Continuing education workshop,
ca. 1970-1985

- Host or broker (some open source) services/applications
- Digitization projects again, please!
- Consultant pools
- CARLI as facilitator of discussions
- Need more continuing education
- Leadership training

Lewis University
Fish Peddler
H. H. Carter Photographs,
1910-1916

Eager for action on…

CARLI's "Open Illinois" initiative

So far:

- Joined Open Textbook Network (OTN)
- Established CARLI's Open Educational Resources Task Force
- Conducted CARLI OER survey

Watch CARLI Newsletter for more information!

OPEN EDUCATIONAL RESOURCES TASK FORCE MEMBERS

Formed in August 2017

- **Anne Shelley, Chair,** Illinois State University
- **Annette Alvarado,** Loyola University Chicago
- **Anne Chernaik,** College of Lake County
- **Chris Diaz,** Northwestern University
- **Kathy Ladell,** Northern Illinois University
- **Elizabeth Nelson,** McHenry County College
- **Susan Shultz,** DePaul University
- **Janet Swatscheno,** University of Illinois at Urbana-Champaign
- **Linda Zellmer,** Western Illinois University

LISTENING SESSIONS, CONTINUED

University of Illinois at Chicago
"Story telling class under Miss Lilly Riley,"
Seven Settlement Houses, 1920s

Telling CARLI's Story

- "Looks like magic…no, it's CARLI"
- "Best investment the State of IL makes of taxpayer dollars"
- "CARLI allows us to punch above our weight"

Emerging from that story…

- CARLI links the profession
- Members depend on CARLI to enrich their professional life

DIRECTORS' WEBINAR SERIES

Academic Library Value and Impact: Instruction and Assessment Webinar

Megan Oakleaf, Associate Professor, iSchool at Syracuse University

Is That OER? Making Sense of the Current Textbook Affordability Landscape

Steven Bell, Associate University Librarian, Temple University Libraries

Demystifying the Process: Getting Your Article Published

Lisa Janicke Hinchliffe, Professor, University of Illinois at Urbana-Champaign

Current Copyright Issues

Carrie Russell, American Library Association, Office for Information Technology Policy, Director, Program on Public Access to Information

…all archived on CARLI's website
https://www.carli.illinois.edu/membership/directors

BUDGET

Swedish American Genealogist
A journal devoted to Swedish American biography, genealogy, and personal history

Volume XXVI   December 2006   No. 4

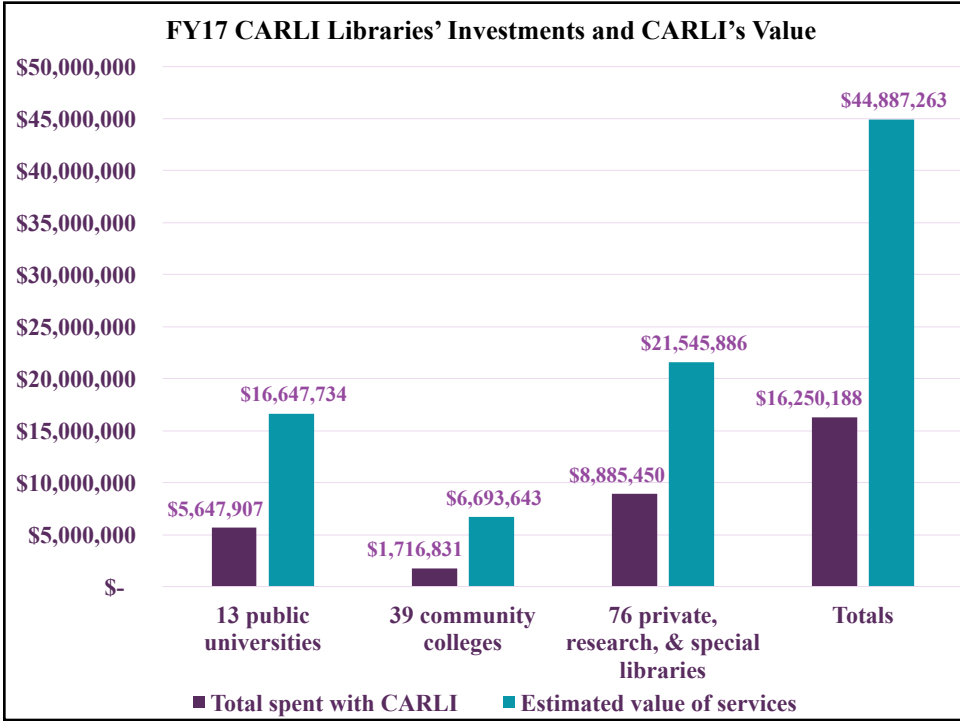*Augustana College Swenson Center*

- **FY2018**
  - -12.6% from FY2015 level
    - In real dollars=decrease of about $525,156 (12.6%)
  - Careful planning during FY15, 16, 17, 18
- **Budget Contingency Task Force, Board of Directors, Finance Committee**
  - Why a Strategic Priority is "ensure stable funding…"
- **CARLI plans ahead (see website for FY19 fees)**
  - Member fees set through FY2019; fees for FY20 soon
  - I-Share fees set through FY2019; fees for FY20 soon

11/15/17

CARLI REVENUE SOURCES FY18

- University of Illinois: $3.8M
- Membership fees: $415K
- I-Share assessments: $1.5M

  _____

- Pass-through:
    - Subscriptions to databases: $17M
    - ILDS grant from the Illinois State Library: $640K

FY17 CARLI Libraries' Investments and CARLI's Value

Chart data:

Category	Total spent with CARLI	Estimated value of services
13 public universities	$5,647,907	$16,647,734
39 community colleges	$1,716,831	$6,693,643
76 private, research, & special libraries	$8,885,450	$21,545,886
Totals	$16,250,188	$44,887,263

11

VALUE OF CARLI TO MEMBER LIBRARIES: AN OVERVIEW	
When your library pays	**Your library will receive**
Membership Fee	• Continuing education • EBSCO databases (and other at-no-cost content) • CONTENTdm (CARLI Digital Collections) • E-resources brokering services
I-Share Assessment	• I-Share • VuFind discovery service
Discretionary purchases	• Subscription e-resources and databases • SFX
No member pays	**ILDS** **Illinois Library Delivery Service** **Paid for by** **grant from SOS/ISL**

E-RESOURCES BROKERING SERVICES

- **Straight pass-through cost from vendor to library**
- **No surcharge applied to the cost**
- **Why advantageous?**
    - Substantial bargaining power of 128 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 10% (usually much greater)
    - Capped annual price increases: average of 5%, which is extremely rare for e-resources
- **About $16.7 million total in CY17**
- **All available through the *very popular* CARLI Selection System**

ALL GOVERNING MEMBER LIBRARIES AT NO COST, FY18

EBSCO Academic Search Complete

EBSCO Business Source Elite

Mary Ann Liebert Journals (2005-2010 content only)

EBSCO provides access to:

- Consumer Health Complete
- ERIC
- Health Source: Consumer Edition
- Health Source: Nursing/Academic Edition
- MasterFILE Premier
- MAS Ultra: School Edition
- Military and Government Collection
- Newspaper Source
- Primary Search
- Professional Development Collection
- Regional Business News

Permanent acquisitions

- Harper's Weekly, 1857-1912
- Illinois Digital Sanborn Maps
- Saskia Fine Art Images
- Springer Medicine E-books (2005-2010)
- Sage E-Journal 2007 Deep Journal Backfile Collection
- Historical Statistics of the United States
- Sage E-reference collection
- Women and Social Movements in the U.S.
- Black Thought and Culture

ILDS UPDATE

- **THANK YOU!** FY18 **Secretary of State/Illinois State Library grant** for ILDS funding

- ILDS services **141 locations** daily; over **1.33 million items** delivered in FY17

- **ILDS Satisfaction Survey** will be completed after January 1, 2018

- Questions or concerns regarding ILDS – submit to support@carli.Illinois.edu

13

THE YEAR AHEAD

*SIU Edwardsville
Alumnus Magazine*

- I-Share Next RFP and Selection
- Open Illinois Initiative/OER Task Force
- More Listening Sessions
- Smaller office footprint
- Institutional Repository Investigative Task Force
- New Directors' Institute
- *CARLI 2020:* Strategic Plan

SHARED INSTITUTIONAL REPOSITORIES

Listening Sessions' Most Prevalent Topic:
The Need for Shared Institutional Repositories

CARLI Board has charged an IR Investigative Task Force to:

- Investigate feasibility of shared IR's and suitable platforms
- Conduct an environmental scan
- Assess members' existing repository structures and inventory
- Task force's charge dictates recommendation cannot impede CARLI core services and must include self-funded solution

What is an institutional repository?

Clifford Lynch, Executive Director, Coalition for Networked Information, stated

"*In my view, a university-based institutional repository is a set of services that a university offers to the members of its community for the management and dissemination of digital materials created by the institution and its community members. It is most essentially an organizational commitment to the stewardship of these digital materials, including long-term preservation where appropriate, as well as organization and access or distribution.*"

- *ARL: A Bimonthly Report*, no. 226 (February 2003)
  - Institutional Repositories: Essential Infrastructure for Scholarship in the Digital Age
    http://www.arl.org/resources/pubs/br/br226/br226ir.shtml

INSTITUTIONAL REPOSITORY INVESTIGATIVE TASK FORCE MEMBERS

Formed in October 2017
- **John Dorr, Chair,** Northwestern University
- **Paul Blobaum,** Governors State University
- **Cheri Cameron,** Parkland Community College
- **Stephanie Davis-Kahl,** Illinois Wesleyan University
- **Jonathan Nabe,** Southern Illinois University
- **Ken Orenic,** College of DuPage
- **Kyle Rimkus,** University of Illinois at Urbana-Champaign
- **Alexis Rogers,** Lincoln Land Community College
- **Laurie Sauer,** Knox College

CARLI NEW DIRECTORS' INSTITUTE 2017

CARLI NDI 2017 Task Force

- **Frances Whaley,** Chair
Illinois Valley Community College

- **Spencer Brayton**
Blackburn College;
now Waubonsee Community College

- **Anne-Marie Green**
Kishwaukee College

- **Lydia Morrow Ruetten**
Governors State University

- **David Stern**
Saint Xavier University

Rebecca Caton	Midwestern University
Carolyn Ciesla	Prairie State College
Patricia Genardo	National University of Health Sciences
Jacob Jeremiah	Oakton Community College
Micheal A Kott	Morton College
Shannon Leathers	Kaskaskia College
Paula Martin	McKendree University
Cathy Mayer	Trinity Christian College
Rebecca Donald	Trinity International University
Ariel Orlov	Adler University
Matt Ostercamp	North Park University
Michelle Nielsen Ott	Methodist College
Dorothy Ryan	Lincoln College
Bradley Tolppanen	Eastern Illinois University
Lesley Wolfgang	St. John's College of Nursing

CARLI NEW DIRECTORS' INSTITUTE 2018

What we hope attendees learn
- High level management and leadership skills
- How to get the most out of the CARLI organization

Who can attend?
- Self-select, but usually ≤3 years in director/dean role

The details
- Commit to both days, all day
- Lodging expense paid for two overnights
- Project for completion after the NDI
- Will receive a mentor if desired

Save the Date!
CARLI NDI 2018

May 16 and 17, 2018
CARLI Office in Champaign

CARLI 2020: STRATEGIC PLAN

- **Draft final document today**
- **Table discussion questions**
- **Reports at end from each table**
- **Input will be used to "smooth" the final document**
- **Think about:**
    - How does your library fit into this plan?
    - How does it impact your library?
    - How does your library's mission statement tie to CARLI's strategic plan?

CARLI Consortium of Academic and Research Libraries in Illinois

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CARLI'S MISSION AND VALUES (UPDATED IN MAY 2017)

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

- *Cooperation and engagement* among academic and research libraries.
- *Innovation* in identifying and implementing collaborative solutions to shared challenges.
- *Careful stewardship* of all CARLI resources.
- *Advocacy* for academic and research libraries at the local, state, regional and national levels.
- *Commitment* to intellectual freedom, privacy, security of library records, library standards, and open access to information resources.
- *Responsiveness* to member needs.

WE'D LOVE TO HEAR FROM YOU!

CARLI Consortium of Academic and Research Libraries in Illinois

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

Bradley University
Peoria Historical Society Image Collection
maintained by the Special Collections Department at
the Cullom-Davis Library