



CARLI

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SENIOR DIRECTOR

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134 member libraries

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

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



New I-Share Libraries in 2016



I-Share:
86
libraries
total!



SOUTH SUBURBAN COLLEGE

Weigh More Options. SOUTH HOLLAND OAK FOREST



Association of Research Libraries

- **Mary Case**, University of Illinois at Chicago, President

American Library Association, LITA

- **Evviva Weinraub**, Northwestern University, Director-at-Large

Illinois Library Association

- **Pattie Piotrowski**, University of Illinois at Springfield, President
- **Dennis Krieb**, Lewis & Clark Community College, Director-at-Large
- **Allen Lanham**, Eastern Illinois Univ., Director-at-Large/ALA Councilor
- **Rob Morrison**, National Louis University, Director-at-Large
- **Sarah Sagmoen**, University of Illinois at Springfield, 2017 Conference Co-Chair

Illinois Association of College and Research Libraries

- **Lindsay Harmon**, Lewis University, President
- **Carolyn Ciesla**, Prairie State College, President-Elect
- **Gwen Gregory**, University of Illinois at Chicago, Past President
- **Eric Edwards**, Illinois State Library, Secretary

Network of Illinois Learning Resources in Community Colleges

- **Beth Mandrell**, Rend Lake College, Chair



- Director of the Illinois State Library for 11 years; ISL for 27 years
- NIU Founders Library before that
- Ex officio on the CARLI Board since its inception in 2005
- As of September 9, a resident of the Urbana-Champaign area!



Contact me anytime
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*Mini attending
her first house
closing*

CARLI updates

- ## CARLI projects

- How might the projects matter in your library?
- Leveraged for the consortium?
- What's next?

- Table discussions of “fire starter questions”
- Turn in written feedback too
- Time at end to name one-two concepts that really resonated



FIRE STARTER QUESTIONS:
<https://www.surveymonkey.com/r/CARLIStratPlanning2020>

Director's report

- Priorities interviews
- Vision for CARLI



*Illinois State University
Main Building circa 1907*



*Saint Xavier University
newspaper*

- At the direction of the CARLI Board
- Aimed at understanding priorities
- In context of:
 - 38% of FY15 appropriation in FY16
 - 54% of FY15 for FY17-to-date
- A contingencies management process



*Lake Forest College
Reid Memorial Library
date unknown*

- Is different from the priorities interviews/contingencies management process
- Time today on strategic planning initiative: *CARLI 2020*



Illinois Valley Community College



Lincoln Land Community College

If our consortium had to reduce services further in light of a drastic budget cut which of the following is most important to you?

- *Shared catalog I-Share*
- *Migration to a new platform for the shared catalog*
- *CARLI supported e-resources*
- *E-resources brokered by CARLI*
- *No-cost delivery (i.e., ILDS)*
- *CARLI staff and facilities*
- *Other services or programs?*
- *Other comments you'd like to share?*



*Chicago State University
Library in the Dome Building
date unknown*



I-Share

E-resources management

CARLI Staff

Most valued for CARLI members!

THEMES THAT EMERGED



*Millikin University
circa 1962*



Dominican University

I-Share: most valued service

- Resource sharing benefits impact *all* Illinois residents
- The power of the shared catalog
 - collections throughout the state
 - delivered in 24 hours
- I-Share libraries couldn't operate LMS for a similar cost
 - staff, software, hardware, staff education
- I-Share familiarity
 - transferring students enter new schools with an advantage

E-resources brokering service is extremely valuable!

- The bargaining power is substantial
- Negotiating pricing/vendor contact managed by CARLI
- New product suggestions are vetted by a group of CARLI peers
- Price caps in place for annual increases: RARE to have!
- CARLI members don't have to manage multiple contracts, invoices, vendors—receive one consolidated invoice
- The online selection tool for e-resources: love it!



Illinois State Library



CARLI staff are extremely valuable!

- Their expertise...
 - CARLI staff who do highly specialized and time-intensive work like contract negotiations for e-resources are not replicated in organizations.
 - They act as surrogate staff for libraries so they can focus on mission-critical staffing needs.
- Specialization at CARLI means that libraries benefit from expertise that comes *only* from sharpened skills in unique and varied settings.



Illinois Central College

*Freeing dollars within
each member organization
to do mission-critical work*

- The leveraging of dollars locally is tremendously important.
- Members can earmark their budget dollars more strategically.



*Lewis and Clark Community College
Sculpture collection 2006*

“The relatively modest investment the State of Illinois and members make impacts *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.”



CARLI will empower member libraries to be vibrant, vital and relevant

Goals

- Provide innovative programs and services to member libraries
- Leverage collaborative efforts to transform services provided *individually* to services provided *at scale*
- Engage member libraries to demonstrate their value

Strategies should focus around

- Collections
- Collaborative services and programs
- Nurtured leadership



University of Illinois Urbana-Champaign



CARLI

Consortium of
Academic and Research
Libraries in Illinois



CARLI UPDATES



- I-Share Next is the working name for whatever software will eventually replace Voyager
- Voyager is stable and still being supported and enhanced by Ex Libris, but the software is aging and is focused on print collection workflows
- CARLI Board established the I-Share Next Task Force (ISNTF) to lead the process of identifying the product that CARLI will ultimately select to replace Voyager
- ISNTF has drafted functional specifications and an evaluation formula for scoring proposals from prospective vendors
- We do not have a final timeline or cost estimate for the project



- CARLI operates as a unit of the University of Illinois and is required to follow Illinois public procurement procedures:
 - Define specifications and requirements
 - Draft a Request for Proposal (RFP) and evaluation scoring
 - UI and State Procurement approve RFP and scoring
 - State Procurement posts RFP on IL Higher Ed Procurement website
 - Prospective vendors submit bids responding to RFP questions and pricing
 - Responses reviewed by Task Force and University Purchasing
 - UI Purchasing reviews pricing, Task Force scores functionality responses
 - Final scores calculated (combination of functionality and cost)
 - Contract negotiated and implementation time line developed
 - Data migration, setup, testing, training, cutover
 - Live on I-Share Next



**WE ARE
HERE**



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The original project timeline estimated a summer 2018 implementation of I-Share Next; this will likely be adjusted after we know when the RFP will be released for bids



Since I-Share Next does not yet have a timeline, and as some non I-Share libraries have asked about moving to I-Share in the shorter term,

CARLI is doing an interest survey for CARLI libraries that may want to move to I-Share in 2017-2018.

Interested libraries should [complete the online survey](https://www.surveymonkey.com/r/IShare2016), (<https://www.surveymonkey.com/r/IShare2016>) and/or contact Kristine Hammerstrand khammer@uillinois.edu

Digital Public Library of America

- Aggregated access to digital libraries across the USA
- DPLA “harvests” the descriptive metadata and links to the digital objects; the digital objects remain in their current locations
- DPLA is a network of “content hubs” and “service hubs”
 - Content hubs
 - Larger libraries, museums, archives that work directly with DPLA
 - Service hubs
 - State, regional collaborations that bring together digital objects from their participating libraries, archives, museums, and other cultural heritage institutions
- CARLI, the Illinois State Library, the Chicago Public Library and the University of Illinois at Urbana-Champaign created a partnership as the Illinois Digital Heritage Hub in 2015



DPLA Funding Agencies Include:

- Alfred P. Sloan Foundation
- Andrew W. Mellon Foundation
- Arcadia Fund
- The Bill & Melinda Gates Foundation
- Institute of Museum and Library Services
- John S. and James L. Knight Foundation
- The Whiting Foundation.
- National Endowment for the Humanities
- Participating Institutions



Illinois Digital Heritage Hub Status

- First IDHH records are coming from CARLI's Digital Collections and the Illinois State Library; other institutions will follow
- Libraries must sign consent forms to participate
- Our staff have been working with DPLA staff to process initial “ingest”
 - Over 200,000 metadata records
 - 118 institutions
 - 345 collections
- Setbacks at DPLA have caused delays
 - First record load is now in DPLA test system for initial round of metadata field mapping and testing
 - DPLA will do data review and work with IDHH to ensure clean metadata records



Metadata Improvements and Continuing Education

- Metadata review and assessment (how it can be improved for the best user experience in DPLA) and shareable metadata training is being done by the University of Illinois at Urbana-Champaign, through a grant from the Illinois State Library
- Provide assistance to library staff in choosing or developing controlled vocabularies for participating institutions
- Metadata presentations coming early 2017 (dates and locations TBD)
 - Topic 1: Introduction to the Illinois Digital Heritage Hub and the DPLA
 - Topic 2: Shareable Metadata and Best Practices
 - Metadata Best Practices Document, also coming in early 2017



Questions on how to participate in IDHH?

Contact Sandra Fritz at the Illinois State Library: SFritz@ilsos.net

Metadata questions?

Contact Hannah Stitzlein: hannahes@illinois.edu

Check out our IDDH poster presentation during the lunch break!



ILDS update

- Lanter Delivery Systems contract expired June 30, 2016
- RFP issued in fall 2015 in accordance with state and university procurement regulations and procedures
- Goal to secure contract for next 5 years of delivery service
- Three vendor proposals received
- Vendor responses evaluated and scored by RFP committee
- Contract for ILDS service awarded to Reaching Across Illinois Library System (RAILS)



ILDS update

- RAILS contract negotiated with initial two-year term and 3 one-year renewal terms
- RAILS became ILDS vendor effective July 1, 2016
- ILDS services 145 locations daily; over 2.23 million items delivered in FY16
- Vendor transition survey issued in September 2016 with 85 responses received – overall generally satisfactory results
- Illinois State Library grant for FY 2017 ILDS funding approved
- Questions or concerns regarding ILDS – submit to support@carli.Illinois.edu or contact Diane Day



- Software Development
 - <http://web-reports.carli.illinois.edu>
 - <http://select-library.carli.illinois.edu>
 - <http://vufind3.carli.illinois.edu>
- Hardware
- Security

