

FISCAL YEAR 2019 ANNUAL REPORT

JULY 1, 2018 - JUNE 30, 2019

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. (CARLI Mission Statement 2018)

Through the combined effort of the CARLI Board of Directors, staff at CARLI member libraries, and the CARLI staff, I am pleased to present this annual report. The report includes the completed CARLI 2020 Strategic Plan and our accomplishments in support of these priorities. The strategic plan outlines our organization's aspirations and defines our understanding of the consortium's focus as we move towards the fifteenth anniversary of CARLI on July 1, 2020, and the fortieth anniversary of resource sharing among Illinois academic libraries in 2020. CARLI is focused on providing excellence, leadership, innovation, and collaboration consistent with our organizational values:

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

Anne Craig
CARLI Senior Director
November 2019

CARLI 2020 Strategic Plan:

SUPPORTING GOALS, ACTIONS AND ACCOMPLISHMENTS

Careful Stewardship

ENSURE ADEQUATE, SECURE, AND STABLE FUNDING FOR CARLI

GOAL: Evaluate impact of the state budget on member libraries

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

GOAL: Define alternative funding formulas and explore potential impacts

ACTIONS: Develop alternate pricing formulas; gather member input on impacts

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

GOAL: Prioritize CARLI services in support of core services

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

GOAL: Explore opportunities to collaborate with other states or organizations

ACTION: Seek opportunities for external funding

FY 2019 Accomplishments

- Recalibrated the CARLI Membership Fee formula, with rates set for individual member institutions through FY24. A recalculation of the formula is scheduled for FY22 in order to slate fees for FY25 and beyond.
- Set the I-Share Assessments for individual member institutions through FY24. A recalculation of the formula is scheduled for FY22 in order to slate fees for FY25 and beyond.
- Selected Ex Libris Alma/Primo VE for library services platform after a lengthy Request for Proposal process. Following years of careful stewardship, implementation and migration costs, as well as the new annual pricing, are achievable without drastic increases to the member assessments.
- Initiated a successful sponsorship program for meetings and professional development events, raising funds to support expenses.

Cooperation and Engagement

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

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

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

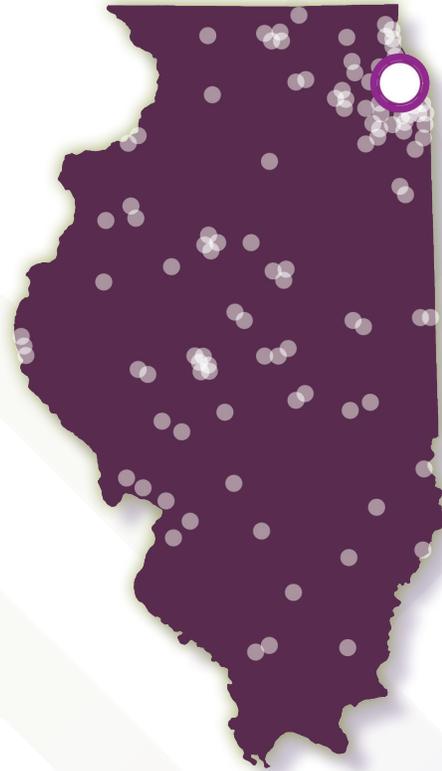
GOAL: Identify new services/programs that are scalable and replicable

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

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

ACTIONS: Establish a Board liaison to each CARLI committee and task force to provide feedback on programs and services, and to ensure committee efforts are informed by the strategic priorities set by the Board

Periodically review the committee structure to ensure alignment with consortial priorities



FY 2019 Accomplishments

- Updated CARLI Bylaws to accommodate brokering resources/services beyond the membership
- Added Chicago History Museum as a Governing Member, effective July 1, 2019
- Thanks to a close affiliation with the North Carolina library consortium, NC Live, CARLI is brokering the “NC Live Website Service,” a design service based on LibGuides style sheets
- Began planning for a November 2019 first-ever CARLI/UIUC iSchool Career Fair
- Continued plans to bring another ACRL RoadShow, “Standards for Libraries in Higher Education,” to the University of Illinois at Chicago in October 2019
- Hosted 55+ training events, open houses and webinars; 1,315 attendees from 112 member libraries
- Held the 2019 New Directors’ Institute on May 15-16 in Champaign, with 11 directors in attendance
- Continued the professional development webinar series for directors. Topics included “Current Copyright Issues,” September 20, and “User Studies, Privacy, and IRB: What Every Librarian Needs to Know,” June 12
- Successfully migrated CARLI Digital Collections to the hosted version of CONTENTdm; includes 297 collections provided by 47 different member libraries; 2.6 terabytes of images, printed and manuscript materials, and sound recordings
- Publishing function for the Digital Public Library of America, the “Illinois Digital Heritage Hub”
 - o Harvested 318,000+ metadata records from: CARLI Digital Collections, University of Illinois at Urbana Champaign, Illinois State Library’s Illinois Digital Archives, Chicago Public Library, Chicago History Museum, DePaul University, Northern Illinois University, Madison Historical, and Des Plaines Memory
- Consortial eBook collection: 3,992 owned titles include 105 coordinated purchases from 38 libraries. Usage in FY 19: 16,000+ loans, 7,300+ downloads from 97 libraries
- Administered ILDS (Illinois Library Delivery Service) providing 24-hr dock-to-dock delivery to 142 stops/day
 - o 768,431 items delivered at \$.75 per item
 - o ILDS is supported by a grant from the Illinois Secretary of State/Illinois State Library

Responsiveness and Commitment

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

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

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

GOAL: Facilitate and strengthen connections between member libraries

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

GOAL: Identify service priorities

ACTION: Regularly survey the membership to gauge member priorities

GOAL: Leverage expertise of member libraries

ACTION: Collect and promote best practices and strategies from CARLI member libraries

GOAL: Seek grants that fund innovation and new services

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

FY 2019 Accomplishments

- Completed licensing of Ex Libris Alma/Primo VE library services platform for an initial term of five years with optional renewals for five additional years
- Concluded the Request for Proposal process for an e-resources package provided to all Governing Members. CARLI pays the annual subscription cost for these e-resources for Governing member libraries:
 - EBSCO Academic Search Complete
 - EBSCO Business Source Elite
- Guided committees to design annual projects and other activities that will be supportive of the Alma Primo VE migration
- Migrated the E-Resources Selection System from CARLI equipment to cloud services
 - Brokered databases for 123 member libraries: 2,777 subscriptions
 - \$16,864,785 total pass-through spending
 - Negotiated new agreements with Bloomsbury and Films on Demand/Infobase
- Provided the I-Share public access catalog of approximately 38 million items
 - Over 245,000 items shared among I-Share institutions
- Provided outstanding performance of operational infrastructure with near-zero downtime, quick resolution of service issues, and excellent support for all customer services, including I-Share, SFX, and the E-resources selection system
- CARLI Created Content Committee hosted the "Linked Data Webinar Series," three well-received webinars with 300+ attendees. Topics included an overview, how linked data exists within the context of the library, and library projects that leverage linked data
- Launched pilot project to test procedures for adding records for scholarly and stable open access eBooks to the I-Share catalog to allow easy access to materials via local catalogs for members which opted-in
- Provided continuing education programming for open educational resources and maintained consortial membership to the Open Textbook Network to support member awareness and understanding of OER

Advocacy

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

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

ACTION: Establish a continuing education program to help member libraries assess their impact on student outcomes such as retention and completion

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

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

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

FY 2019 Accomplishments

- Received an Institute of Museum and Library Services (IMLS), Laura Bush 21st Century Librarian Program grant, in the amount of \$243,885 to fund “CARLI Counts: Analytics and Advocacy for Service Development,” a continuing education library leadership immersion program prepares librarians to make effective use of research findings on the impact of academic libraries on student success for the twin purposes of service development and library advocacy. This three-year project began October 1, 2018.
 - o One of 14 projects (out of 73 initial proposals) to receive funding.
 - o Program partners: University of Illinois Library at Urbana-Champaign, Lewis & Clark Community College
 - o CARLI is augmenting grant funding of CARLI Counts with an additional \$40,000 to fund all applicants.
- Initiated planning for events in 2020 to celebrate the 40th anniversary of resource sharing for CARLI and its predecessor organizations.

Innovation

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

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

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

Convene CARLI groups on specific in-demand topics identified through periodic surveys and other channels

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

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

FY 2019 Accomplishments

- CARLI Committees and Task Forces worked hard to bring members together across the state, including:
 - o “Change is Good: You Go First! Leading Others To and Through Change!” University of Illinois at Chicago, April 2, 2019. Sponsored by the Technical Services and Collection Management Committees
 - o Emerging Issues in E-Resources: Streaming Video and Usage Statistics, Champaign, March 26, 2019. Sponsored by the CARLI Commercial Products Committee
 - o Conservation Lab Open Houses Abraham Lincoln Presidential Library and Illinois State Military Museum
 - o Resource Sharing Open House at Bradley University and UIC Library of the Health Sciences-Peoria

Value

CARLI DELIVERED \$45 MILLION IN GOODS AND SERVICES TO MEMBERS, WITH A RETURN ON INVESTMENT OF \$3.87 FOR EVERY \$1 SPENT BY MEMBERS.

- Annual “CARLI Value Letters” are provided to each member library estimating individual member Return on Investment
- Membership fees collected: \$427,913 (130 member libraries)
- I-Share assessments collected: \$1,614,704 (91 participating libraries)

When a member pays	The member will receive
Membership Fee	<ul style="list-style-type: none"> • Continuing education • EBSCO databases (and other at-no-cost content) • CONTENTdm (CARLI Digital Collections) • E-resources brokering services
I-Share Assessment	<ul style="list-style-type: none"> • I-Share • VuFind discovery service
Discretionary purchases	<ul style="list-style-type: none"> • Subscription e-resources and databases • SFX
No member pays	<ul style="list-style-type: none"> • ILDS (Illinois Library Delivery Service) <p>Paid for by a grant from Illinois Secretary of State/ Illinois State Library</p>

Impact

MEMBER LIBRARIES SERVE 90% OF HIGHER EDUCATION STUDENTS, FACULTY, AND STAFF

CARLI’s 130 member libraries include

- 128 Governing Members
 - o All Illinois public universities
 - o All Illinois community colleges
 - o Private, research, and special
 - o 91 I-Share Participating Libraries
- 2 Affiliates Members (for-profit institutions)

FY 2019 GOVERNING MEMBERS (I-Share participating libraries)

Abraham Lincoln Presidential Library and Museum

Adler University

American Islamic College

Augustana College

Aurora University

Benedictine University

Black Hawk College

Blackburn College

Blessing-Rieman College of Nursing

Bradley University

Carl Sandburg College

Catholic Theological Union

Chicago State University

Chicago Theological Seminary

City Colleges of Chicago

College of DuPage

College of Lake County

Columbia College Chicago

Concordia University Chicago

Danville Area Community College

DePaul University

Dominican University

East-West University

Eastern Illinois University

Elgin Community College

Elmhurst College

Erikson Institute

Eureka College

Field Museum of Natural History

Garrett-Evangelical Theological Seminary

Governors State University

Greenville University

Harper College

Heartland Community College

Highland Community College

Illinois Central College

Illinois College

Illinois College of Optometry

Illinois Eastern Community Colleges

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 Marshall Law School

John Wood Community College

Joliet Junior College

Judson University

Kankakee Community College

Kaskaskia College

Kishwaukee College

Knox College

Lake Forest College

Lake Land College

Lakeview College of Nursing

Lewis and Clark Community College

Lewis University

Lincoln Christian University

Lincoln College

Lincoln Land Community College

Loyola University Chicago

MacMurray College

McHenry County College

McKendree University

Meadville Lombard Theological School

Methodist College

Midwestern University

Millikin University

Monmouth College

Moody Bible Institute

Moraine Valley Community College

Morton College

National University of Health Sciences

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

Prairie State College

Principia College

Pritzker Military Museum & Library

Quincy University

Rend Lake College

Resurrection University

Richland Community College

Robert Morris University

Rock Valley College

Rockford University

Roosevelt University

Rosalind Franklin University of Medicine

Rush University

Saint Augustine College

Saint Francis Medical Center College of Nursing

Saint John's College of Nursing

Saint Xavier University

Sauk Valley Community College

School of the Art Institute of Chicago

Shawnee Community College

South Suburban College

Southeastern Illinois College

Southern Illinois University

Carbondale

Southern Illinois University

Edwardsville

Southern Illinois University School of Medicine

Southwestern Illinois College

Spertus Institute for Jewish Learning and Leadership

Spoon River College

Trinity Christian College

Trinity International University

Triton College

University of Chicago

University of Illinois at Chicago

University of Illinois at Springfield

University of Illinois at Urbana-Champaign

University of St Mary of the Lake Mundelein Seminary

University of St. Francis

VanderCook College of Music

Waubonsee Community College

Western Illinois University

Wheaton College

FY 2019 AFFILIATE MEMBERS

Fox College

Rasmussen College Rockford

Leadership

CARLI FY 2019 BOARD OF DIRECTORS

Fred Barnhart	Public Universities	Northern Illinois University
Anne Craig	Ex Officio	CARLI
Richard Darga	Ex Officio	Chicago State University
Rebecca Donald	Private Institutions	Trinity International University
Jeff Douglas	Private Institutions	Knox College
Cindy Fuller	Private Institutions	Millikin University
Cate Kaufman	Community Colleges	Illinois Central College
Micheal Kott	Community Colleges	Morton College
Tammy Kuhn-Schnell	Community Colleges	Lincoln Land Community College
Michael Lorenzen	Public Universities	Western Illinois University
Greg McCormick	Ex Officio	Illinois State Library
Lydia Morrow Ruetten	Public Universities	Governors State University
John Pollitz	Public Universities	Southern Illinois University Carbondale
John Small	Private Institutions	North Central College
Frances Whaley	Community Colleges	Illinois Valley Community College

Support staff

CARLI is a unit of the University of Illinois System, reporting to Barbara J. Wilson, Executive Vice President and Vice President for Academic Affairs.

ADMINISTRATION

Anne Craig, Senior Director

BUSINESS AND FINANCE SERVICES

Diane Day, Fiscal Officer

Tim David, Delivery Program Administrator/
Accountant

Katrina Little, Account Technician II

COMMUNICATIONS

Margaret Chambers, Director, Membership and
Communications

Michelle Haake, Business Administrative Associate

Ed Schell, Web Developer

COLLECTIONS SERVICES

Elizabeth Clarage; Director, Collections Services

E-RESOURCES

Cindy Clennon; Director, Electronic Resources

Jenny Taylor, Senior Electronic Resources
Coordinator

SYSTEMS SERVICES

Gordon Fellows, Assistant Director, System
Services

Chris Delis, Application Support Specialist

Jessica Gibson, Senior Application Support
Coordinator

Todd Pavlik, Data Coordinator

Chris Saunders, Database Specialist

Bradley Woodruff, Library Application Support
Consultant

USER SERVICES

Kristine Hammerstrand, Director, User Services

Debbie Campbell, Library Services Coordinator

Lorna Engels, Library Systems Coordinator

Denise Green, Library Services Coordinator

Amy Maroso, Senior Digitization Coordinator

Jennifer Masciadrelli, Senior Project Management
Coordinator

Ted Schwitzner, Senior Library Services Coordinator

Nicole Swanson, Library Services Coordinator