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”
  - 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
  - 768,431 items delivered at $.75 per item
  - 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)

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<thead>
<tr>
<th>When a member pays</th>
<th>The member will receive</th>
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| 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 a grant from Illinois Secretary of State/Illinois State Library |

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)
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<th>Governing Members</th>
<th>Affiliate Members</th>
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<tr>
<td>Abraham Lincoln Presidential Library and Museum</td>
<td>Quincy University</td>
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<td>Rend Lake College</td>
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<td>American Islamic College</td>
<td>Resurrection University</td>
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<td>Rosalind Franklin University of Medicine</td>
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<td>Wheaton College</td>
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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