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)

CARLI continues to focus 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

Fiscal Year 2020 was drastically different for everyone because of the pandemic. National, state, and local leaders began shuttering businesses, offices, and campuses due to the outbreak of COVID-19 in March 2020. As faculty and staff at CARLI member institutions struggled to quickly pivot to working from home and online instruction, CARLI staff worked to support members as they provided services and materials. As the pandemic continued, many member libraries received news of staff layoffs and/or furloughs and deep reductions to materials budgets.

The CARLI Board of Directors and staff held emergency meetings to identify ways in which the organization could support members during these extraordinary times. Using consortial funds, CARLI purchased nearly $800,000 in consortially sharable e-books, negotiated with all e-resources vendors to lower pass-through pricing, and cut CARLI Membership Fees by 10% for FY2020. CARLI also began hosting biweekly Governing Directors Zoom meetings for the purpose of sharing best practices for providing services and sharing materials. Against this backdrop, CARLI successfully migrated 89 I-Share members to a new library services platform, meeting each implementation milestone date.

I am so proud of how the consortium pulled together to lessen the pandemic’s impact for students, faculty, and staff. I look forward to continuing our long and rich history or collaboration in FY2021 and beyond.

Anne Craig  
CARLI Senior Director  
January 2021
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 2020 Accomplishments

- Initiated a successful sponsorship program for meetings and professional development events, raising funds to support expenses
- Funded by donations, established the CARLI Scholarship, to provide financial assistance to current employees of CARLI Governing Member Libraries pursuing graduate studies leading to a Master’s Degree in Library and Information Science at the University of Illinois at Urbana-Champaign
- Along with several other library consortia, formed the Professional Development Alliance to bring no-cost professional development virtual opportunities to member libraries
- Co-hosted with the University of Illinois Chicago and Northwestern University to present the Association of College & Research Libraries: Standards for Libraries in Higher Education Workshop
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 2020 Accomplishments

- Successfully migrated 89 I-Share libraries to a new library services platform and discovery service, Ex Libris Alma and Primo VE, providing consortial access to a collection of 38.6 million items to over 580,000 students, faculty, staff at I-Share participating institutions
- Approved approximately $800,000 for the purchase of consortially shareable ebooks
- Added the Institute for Clinical Social Work as a Governing Member, effective July 1, 2020
- Provided the publishing function for the Digital Public Library of America, the “Illinois Digital Heritage Hub.” IDHH contributed to the DPLA approximately 380,000 metadata records from CARLI Digital Collections, the Illinois State Library’s Illinois Digital Archives, DePaul University, Illinois State University, Northern Illinois University, University of Illinois Urbana-Champaign, Chicago Public Library, and Madison Historical
- Added the 300th collection to CARLI Digital Collections
- Held the first-ever CARLI/UIUC iSchool Career Fair
- Administered ILDS (Illinois Library Delivery Service) providing 24-hr dock-to-dock delivery to 142 stops/day with 536,297 items delivered. (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 2020 Accomplishments

- Provided access to OpenAthens to assist libraries in establishing single sign-on service for all Governing Members through June 30, 2023, to be paid by CARLI
- Supported five CARLI member libraries’ staff to attend the Open Education Network’s Certificate in OER Librarianship Program
- Provided funding for research projects from Saint Xavier University and Trinity International University
- Received a grant from the Secretary of State/Illinois State Library to provide I-Share training to support transition to new library management system
- 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, and the E-resources selection system
- Kristine Hammerstrand, CARLI Director of User Services, was the recipient of the 2019 Illinois Library Association’s Technical Services Award. This annual citation is awarded to an individual who has made a substantial contribution in the area of library technical services. Kristine reflects the dedication and commitment of CARLI staff to support the needs of members across the state of Illinois
- Quickly adapted to pandemic-related library closures including turning off requesting operations in Voyager on short notice while completing the complex work necessary for the Alma Primo VE implementation
- Negotiated new e-resources contracts with Swank Motion Pictures and Statista
- Negotiated access to no-cost resources from e-resource vendors, and the expansion of the EBSCO Academic Search Complete package to Academic Search Ultimate
- Negotiated additional e-resource discounts for FY21 to support member libraries’ speedy transition to remote services
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 2020 Accomplishments

- Completed Year 1, started Year 2, of the Institute of Museum and Library Services Grant, “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
- 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
- Published the “Statement on the Importance of a Library Director”

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 2020 Accomplishments

- Initiated support for member attendance to the “Open Textbook Network’s Certificate in OER Librarianship Program”
- Hosted the “Mid-Level Leadership Symposium, CARLI’s Next Deans and Directors”
- Continued the professional development webinar series for directors. Topics included “Project Outcome Toolkit,” July 19; “CARLI Counts in LIBRAS Libraries,” November 6; and “Managing Your Professional Identity” November 20
Value
CARLI DELIVERED $42.6 MILLION IN GOODS AND SERVICES TO MEMBERS, WITH A RETURN ON INVESTMENT OF $2.56 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: $449,278 (130 member libraries)
• I-Share assessments collected: $1,727,731 (91 participating libraries)

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<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
• OpenAthens

**Discretionary purchases**

• Subscription e-resources and databases

**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)
FY 2020 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 History Museum
- 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 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 University
- 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

FY 2020 AFFILIATE MEMBERS

- Fox College
- Rasmussen College
- Rockford

- 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

*Institution closed in FY20
Leadership

CARLI FY 2019 BOARD OF DIRECTORS

Fred Barnhart  Public Universities  Northern Illinois University
Spencer Brayton  Community Colleges  Waubonsee Community College
Anne Craig  Ex Officio  CARLI
Rebecca Donald  Private Institutions  Trinity International University
Jeff Douglas  Private Institutions  Knox College
Cindy Fuller  Ex Officio  Millikin University
Karen Janke  Private Institutions  Erikson Institute
Jacob Jeremiah  Community Colleges  Oakton Community College
Tammy Kuhn-Schnell  Community Colleges  Lincoln Land Community College
Taran Ley (Chair)  Public Universities  Southern Illinois University School of Medicine
Greg McCormick  Ex Officio  Illinois State Library
Pattie Piotrowski  Public Universities  University of Illinois Springfield
John Pollitz  Public Universities  Southern Illinois University Carbondale
John Small  Private Institutions  North Central College
Frances Whaley  Community Colleges  Kishwaukee College

FY20 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, Senior Coordinator Membership and Communications
Ed Schell, Web Developer
Nicole Swanson, Senior Coordinator, Library Services and Outreach

COLLECTIONS SERVICES
Elizabeth Clarage; Director, Collections Services

E-RESOURCES
Cindy Clennon; Director, Electronic Resources (retired August 2019)

Jenny Taylor, Senior Coordinator Electronic Resources
Nicole Ream-Sotomayor, Senior Coordinator Electronic Resources

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