CARLI

ANNUAL MEETING
NOVEMBER 4, 2022

Sarah M. Zehr Gantz, PhD

Assistant Vice President for Academic Affairs

Office of the Executive Vice President/Vice President for Academic Affairs

University of Illinois System

CARLI Board of Directors

Name	Constituency	Term	Institution
Jo Cates	Private Institutions	2022-2024	Columbia College Chicago
Anne Craig	Ex Officio		CARLI
Stephanie Davis-Kahl	Private Institutions	2022-2025	Illinois Wesleyan University
Jacob Jeremiah	Community Colleges	2020-2023	Oakton Community College
Dennis Krieb	Community Colleges	2022-2025	Lewis & Clark Community College
Dallas Long	Public Universities	2021-2024	Illinois State University
Greg McCormick	Ex Officio		Illinois State Library
Matt Ostercamp, Chair-Elect	Private Institutions	2020-2023	North Park University
Pattie Piotrowski	Public Universities	2022-2025	University of Illinois Springfield
Shannon Pohrte	Community Colleges	2021-2024	Elgin Community College
John Pollitz	Public Universities	2022-2023	Southern Illinois University Carbondale
Sharon Silverman, Chair	Community Colleges	2022-2023	City Colleges of Chicago
Anne Thomason	Private Institutions	2022-2023	Knox College

Implementing DEIA Initiatives in Libraries in Today's Climate

Victor Jones Jr.
M.S., M.Div. (He/Him/His)
Director of Diversity, Equity, Inclusion, and Accessibility
University of Illinois Urbana-Champaign
University Library

Illinois Academic Librarian of the Year Award

Michelle Nielsen Ott

Cullom-Davis Library, Bradley University

Hugh C. Atkinson Memorial Award

Booth Library

Eastern Illinois University

CARLI Grows. . .
Teaching
Learning
Innovation
Research
Scholarship

CARLI Grows the Profession

Celebrating library resource sharing since 1980

The CARLI Scholarship:

- Provides financial assistance to current employees of CARLI Governing Member Libraries

- Employees pursuing graduate studies leading to a Master's Degree in Library and Information Science at the University of Illinois Urbana-Champaign

https://www.carli.illinois.edu/give

- Brandi Castillo, Kankakee Community College
- Abigail Johnson, Lake Forest College
- Nathan Thebarge, Trinity International University

Congratulations!

https://www.carli.illinois.edu/membership/carli-scholarship-apply

Funded by System Office and CARLI

- AY 22-23 and AY 23-24

- Two positions; each works 10 hours/week

- Pays salary and tuition

Recipients AY 22-23

- Sarah Rebecca Velazquez Gaglio

- Wardah Mohammed

Locations

- Chicago Theological Seminary

- Loyola University Chicago

- Moraine Valley Community College

- University of Illinois Chicago

STRATEGIC PLAN

ENSURE ADEQUATE, SECURE, AND STABLE FUNDING FOR CARLI

- Grant funding for new projects, programs
- Philanthropy program
- Crowdfunding (ebooks, OEN)
- Collaboration with nine other consortia for the PDA

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

- Hosting check-in sessions
- Established Open Illinois

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

- Applied for and received federal and state competitive grants
- Expanding participation in I-Share

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

- CARLI Counts builds assessment skills
- Produced new talking points two-pager

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

- Building skills through OEN Certificate in OER Librarianship
- Skills through PDA, CARLI Counts, Illinois SCOERs

- Need to work together on scale solutions:
  - Storage of materials, Shared IR, data for standardized surveys, open access publishing agreements
- Ideas for professional development
- Communication and education of membership: priorities
- Many institution-specific issues beyond CARLI's control but important to know about

Input so far…

- Illinois Library Transformations Survey

  - Summary: https://www.carli.illinois.edu/sites/files/files/SummaryIIllinoisLibraryTransformationsSurveyResults.pdf

  - Report: https://www.carli.illinois.edu/sites/files/files/DetailedIllinoisLibraryTransformationsSurveyResults.pdf

- In-person Listening Sessions

- Zoom Sessions

- SurveyMonkey Survey (still open)

  https://www.surveymonkey.com/r/CARLI_priorities

Timeline

- Draft to you in early 2023

- Publish in mid-2023

Cohort 4 plans for 2023!

- Apply now to participate! Due December 1, 2022
- Can be alumni or new to CARLI Counts
- In-person meeting dates:
  - March 28-30, 2023
  - August 8-10, 2023

To apply:
https://www.carli.illinois.edu/products-services/prof-devel/carli-counts

Continuing education program

- Year-long

- Team-based

- Immersion through two in-person and virtual monthly sessions

- Each participant works on an assessment project for their own institution

- Program pays for your staff member's lodging and food for in-person sessions

How do I advocate for my library? Can I use assessment data to design services and programs?

Context

- Intense competition for dollars at your institution
- Data-driven decisions at your library

Vision

- Grow assessment skills locally and in CARLI
- Members can talk to stakeholders about student success and retention in relation to their library's contribution

CARLI Counts helps your organization build assessment skills

The Consortium of Academic and Research Libraries in Illinois (CARLI)

128 Governing Member libraries

- **All** Illinois public universities :   13
- **All** Illinois community colleges: 39
- Private colleges and universities: 67
- Special research libraries: 9

CARLI member libraries serve 90% of Illinois undergraduate students, 41% are minorities

Anne Craig, Senior Director

MEMBERSHIP AND COMMUNICATIONS
Margaret Chambers, Director and Advisor, Membership and Communication

- Michelle Haake, Senior Coordinator Membership & Communications
- Ed Schell, Web Developer
- Nicole Swanson, Senior Coordinator, Library Services and Outreach

BUSINESS AND FINANCE SERVICES
Diane Day, Fiscal Officer

- Tim David, Accounting Specialist
- Katrina Little, Invoicing Specialist

COLLECTIONS SERVICES
Elizabeth Clarage, Director, Collections Services

- Michele Leigh, Senior Coordinator, Open Illinois

E-RESOURCES
Jenny Taylor, Associate Director, Electronic Resources

- Denise Green, Senior Library Services Coordinator
- Nicole Ream-Sotomayor, Senior Electronic Resources Coordinator
- Marisa Tolbert, Library Services Coordinator

SYSTEMS SERVICES
Jessica Gibson, Assistant Director, System Services

- Christopher Delis, Application Support Specialist
- Todd Pavlik, Data Coordinator
- Bradley Woodruff, Library Application Support Consultant
- *New staff member mid-November*

USER SERVICES
Jennifer Masciadrelli, Assistant Director, User Services

- Debbie Campbell, Senior Library Services Coordinator
- Martin Kong, Library Services Coordinator
- Amy Maroso, Senior Digitization Coordinator
- Adrienne Radzvickas, Library Services Coordinator
- Ted Schwitzner, Senior Library Services Coordinator

New Staff

- o Martin Kong, Library Services Coordinator
- o Michele Leigh, Senior Coordinator, Open Illinois
- o Marisa Tolbert, Library Services Coordinator
- o *Senior Library Application Coordinator starting Nov. 14*

Promotions

- o Margaret Chambers, Director and Advisor, Membership and Communications
- o Jessica Gibson, Assistant Director, System Services
- o Jennifer Masciadrelli, Assistant Director, User Services
- o Jennifer Taylor, Associate Director, Electronic Resources

Departures

- • Gordon Fellows, Kristine Hammerstrand, and Christopher Saunders

- Work on spectrum of projects/services

- Represent diverse institutions

- Unite member libraries' staff

THANK YOU for your excellent work!

CARLI Mission

We empower our academic and research libraries to build and sustain an accessible, diverse, and responsive knowledge environment that promotes excellence and innovation in teaching, learning, and research. CARLI adds value for all member libraries by sharing costs, collections, expertise, programs, products, and services.

CARLI Statement of Values

We are committed to:
- Diversity, equity, inclusion, and accessibility
- Intellectual freedom, privacy, and open access to information resources
- Careful stewardship of all CARLI resources
- Advocacy for academic and research libraries at the local, state, regional and national levels
- Supporting cooperation and engagement among academic and research libraries
- Being responsive to member needs
- Identifying and implementing collaborative solutions to shared challenges and reducing barriers

CHANGES TO THE CARLI BYLAWS

Change	Reason
Change name to CARLI Governance Board	The name "Board of Directors" implies fiduciary responsibility. The board does not assume financial responsibility, either collectively or individually.
Eliminate Affiliate Membership category	Only two affiliate members in FY23; libraries can continue with their current benefits, including attending CE events and subscription to email lists. For-profit institutions will have no membership option. Allows focus on not-for-profit members.
Clarify definition of membership benefits	Clarifies for members who qualifies for CARLI services and programs. Clarifies access to remote patrons.
Clarify the purpose of the Board	Clarifies that the Board provides critical leadership in the areas of planning and service development. The Board does not approve the budget amounts but leads CARLI's expenditures by setting priorities.

- Over $16 million in database subscriptions, including journals billed through EBSCO
- Six contract renewals either completed or in process, including new contract for Syndetics Unbound
- Advocating for lowest possible price increases
  - Many vendors still have flat pricing.
  - ***CARLI members sharing their stories of budget issues has helped CARLI advocate with vendors for lower pricing***
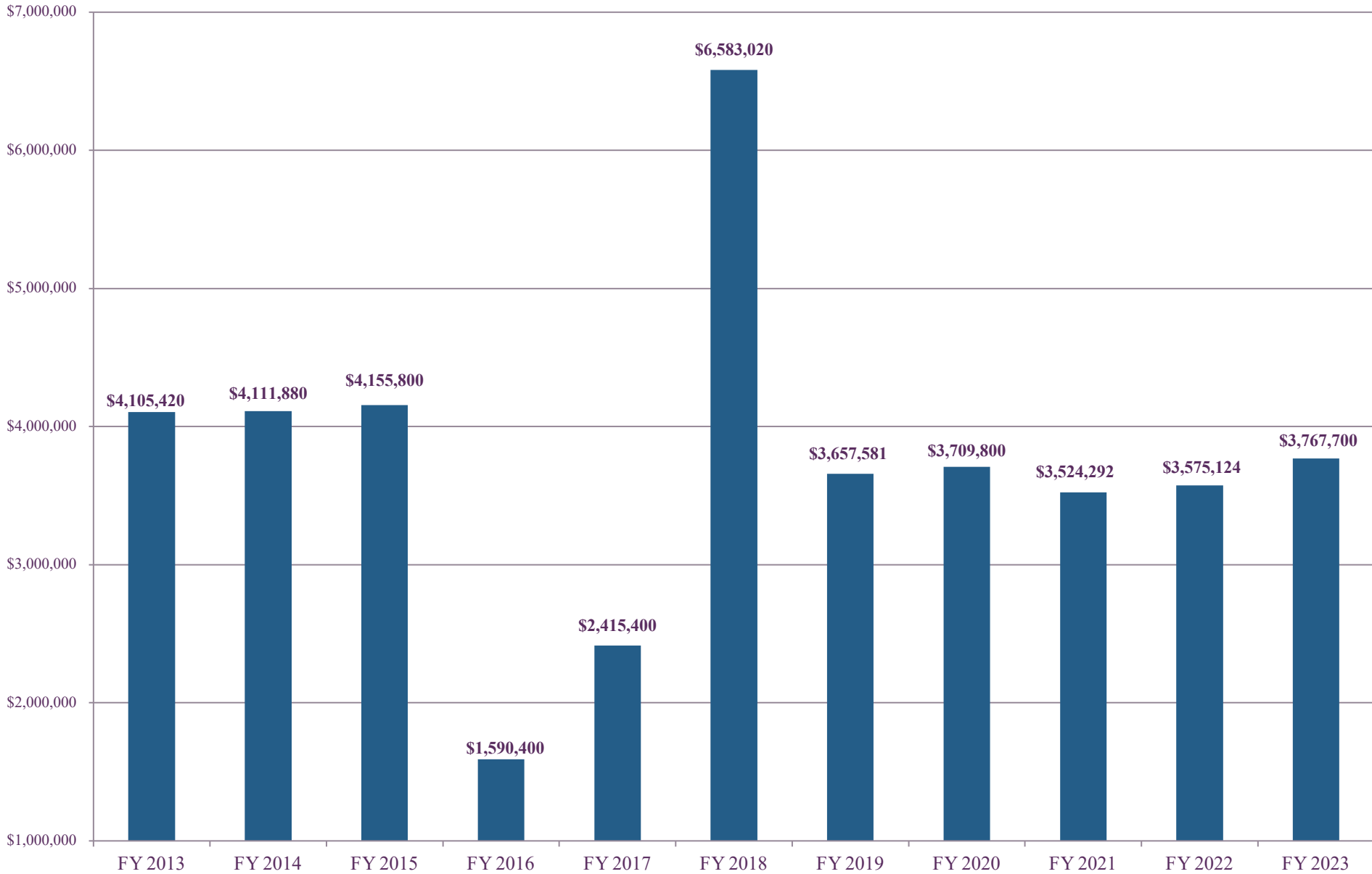
CARLI REVENUE SOURCES FY23

	FY2022	FY2023	change	
University of Illinois System Office	$3,575,124	$3,767,700	$192,576	5.3%
Membership Fees	$465,291	$490,255	$24,964	5.1%
I-Share Assessments	$1,838,848	$1,883,349	$44,501	2.4%

Pass-through revenue	FY2022	FY2023	change	
Subscriptions to databases *estimated for FY23*	$14,650,642	$14,890,000	$239,358	1.6%
ILDS (Illinois Library Delivery Service) grant (IL State Library) *estimated for FY23*	$880,438	$916,705	$36,267	4.0%

CARLI State Funding Allocations
FY 2013 - FY 2023

Fiscal Year	Allocation
FY 2013	$4,105,420
FY 2014	$4,111,880
FY 2015	$4,155,800
FY 2016	$1,590,400
FY 2017	$2,415,400
FY 2018	$6,583,020
FY 2019	$3,657,581
FY 2020	$3,709,800
FY 2021	$3,524,292
FY 2022	$3,575,124
FY 2023	$3,767,700

CARLI Membership Fees for FY22–27:
https://www.carli.illinois.edu/sites/files/files/MembershipFees.pdf

I-Share Assessments for FY22–FY27:
https://www.carli.illinois.edu/sites/files/files/I-ShareAssessments.pdf

- Moving to Illinois Heartland Library System Building
  - Saving $100,000 annually in rent and facility costs
- Requested and received increased funding from System Office
  - Additional $127,000 for e-resources package

- Nearly 340 collections provided by 47 different institutions
- Over 3.1 TB of images and metadata
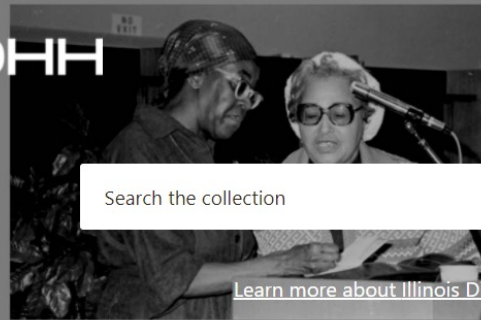- https://collections.carli.illinois.edu

- Collaborative venture among CARLI, ISL, CPL & UIUC
- CARLI staff support REPOX harvester
- IDHH currently contributing over 516,000 metadata records from:
  - CARLI:
    - CARLI Digital Collections plus
    - DePaul University, Illinois State University, Northern Illinois University, University of Illinois Urbana-Champaign
  - Chicago Public Library
  - Des Plaines Public Library
  - Illinois State Library's Illinois Digital Archives
  - Madison Historical (online encyclopedia & digital archive for Madison County)

DPLA information page for CARLI members:
https://www.carli.illinois.edu/products-services/contentdm/dpla

IDHH DPLA portal: https://idhh.dp.la/

IDHH

| Search the collection | **Search** |

Learn more about Illinois Digital Heritage Hub

A Gateway to Illinois State History

The Illinois Digital Heritage Hub brings together unique digital cultural heritage resources from across Illinois. Explore collections immense in volume and rich in historical detail, including photographs, manuscripts, books, audio recordings, and videos. Established in 2015 by four institutions, the Chicago Public Library, the Consortium of Academic and Research Libraries in Illinois, the Illinois State Library, and the University of Illinois at Urbana-Champaign Library, the content of the IDHH is made possible by a network of more than 150 partners from across the state, including dozens of institutions providing content through the Illinois Digital Archives and CARLI Digital Collections.

Illinois History

Sports

Illinoisans participating in all kinds of sports throughout the years

Postcards

Postcards throughout the ages featuring scenes and people from around Illinois

Art

Illinois art collections and the people who enjoy them

Architecture

Structures in Illinois that range from historic to modern, commercial to residential, rural to urban

Century of Progress

Chicago's second world's fair celebrated the city and the nation's future, 1933-1934

Cherry Mine Disaster

1909 deadly mining disaster spurred Illinois to create stronger mine safety legislation

https://idhh.dp.la/

Access to Wiley and Oxford Ebooks

- Unlimited access for All CARLI Governing Members

- May be used for course materials or for course reserves

- Direct links may be embedded into course management systems

Funded by:			
FY21 (July 2020 - June 2021)	FY22 (July 2021- June 2022)	FY23 (July 2022 - June 2023)	FY24 (July 2023 - June 2024)
CARLI consortial funds	ISL Grant Plus Funds Contributed by 70 Members	Funds Contributed by 70 Members	Member Funds
$760,000	$452,500	$278,000	

	FY21	**FY22**	**FY23**
Content available	Perpetual Access to: 2,017 Wiley Online Books 1,348 Oxford University Press Ebooks 364 OUP Partner Press Ebooks	Perpetual Access to: 1,835 Wiley Online Books 636 Oxford University Press Ebooks	Access to: ~3,250 Wiley Online Books • Published between 2018 – June 2023 ~ 2,800 Oxford Univ. Press Ebooks • Published between 2018- June 2023 • Nine Subject Collections: Biology, History, Law, Music, Political Science, Psychology, Religion, Social Work, and Sociology
	Perpetual Access to: 3,729 Ebooks	**Perpetual Access** to: 2,471 Ebooks	**Access Collection Size:** ~6,050 Ebooks

- Resource sharing is highly valued

- Crowdfunding can work

- Member support provides great access and ownership!

  - More than what any one member can individually purchase

CARLI partners with ten other library consortia to create the Professional Development Alliance

- No-cost opportunities

- Several every month; on the CARLI Event Calendar

- Find recordings and slides from past programs at
  https://www.carli.illinois.edu/products-services/prof-devel

We are eager for your suggestions! support@carli.illinois.edu

PDA by the Numbers

- 268 total programs offered to CARLI Members from all PDA Consortia in FY21 – FY23 to date
- 44 CARLI-Sponsored Programs
- 5,020 registrants for CARLI-Sponsored Programs

PDA E-Resources Learning Series in November

- November 10:
  - Addressing Accessibility in E-Resources Licensing
  - Vendor Relations: More Than Invoices And Sales Calls!
  - E-Resources Discussion Forum
- November 14: No Electronic Resources Librarian is an Island
- November 16: The Use of Python to Support Technical Services Work in Academic Libraries
- November 17: The Tribulations of Quantification: An Airing of Grievances on Usage Statistics
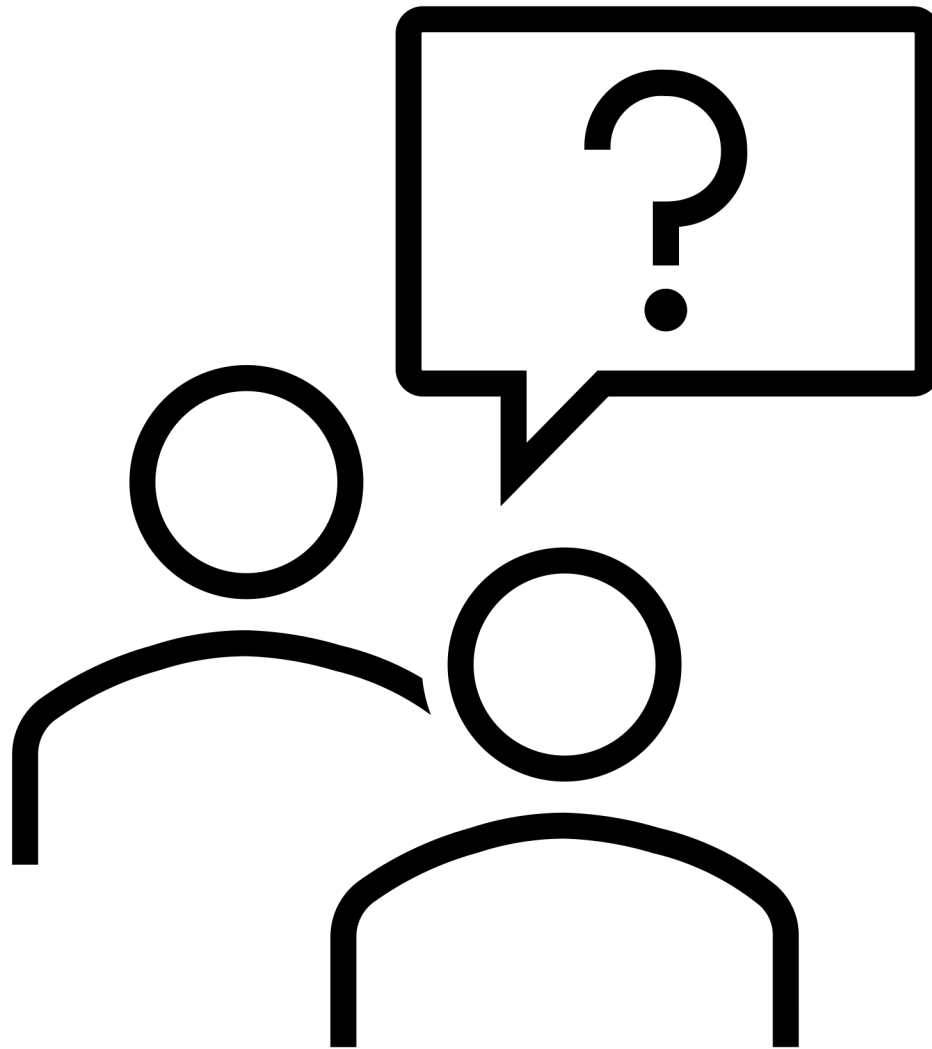
- ILDS has returned to five-day-a-week delivery.

- Both RAILS and IHLS have ended the quarantine of items. CARLI is no longer recommending libraries quarantine outgoing ILDS items.

- 344,567 items delivered through ILDS in FY22

  - approximately two-thirds of the volume before the COVID-19 pandemic in FY20

- Questions? support@carli.illinois.edu

- Illinois SCOERs program

- New I-Share libraries

- Strategic plan update

- CARLI Counts

- Ebooks crowdfunding project for FY23/24

- Bylaws update

- Continued work on the Shared Institutional Repository

- Relationship with the iSchool/BIG (Business Intelligence Group)

https://pixabay.com/photos/drop-of-water-drop-impact-ripples-578897/

- Email lists: https://www.carli.illinois.edu/email-lists
- Website: https://www.carli.illinois.edu/
- CARLI Support Email: support@carli.illinois.edu
- Toll-free phone: (866) 904-5843

- Monthly Newsletter
- Directors' Updates emails
- Annual "Value Letter" for each member

- Board / Committee / Task Force: minutes available
- CARLI Calendar: registration info listed ASAP

I-Share Update

FY2022 "By The Numbers"

Title Reduction Project Update

New I-Share Libraries

- CARLI staff resolved 2,058 support inquiries from our I-Share libraries about Alma and Primo VE between July 1, 2021-June 30, 2022.

- CARLI staff opened over 100 Cases with Ex Libris to address Alma and Primo VE related issues for I-Share member libraries.

- CARLI staff presented nearly 50 topical webinars between July 1, 2021-June 20, 2022, on Alma and Primo VE including:
  - Open Office Hours
  - Tech Services Q&A
  - Let's Talk about Fulfillment (LTAF)

- CARLI provided 400 paid registrations to ELUNA Learns 2022 sessions for members.

Early 2021: Ex Libris identified CARLI had exceeded the bibliographic title count metric for our license for I-Share libraries.

CARLI Response: Title Reduction Project

- Addressed duplicate electronic resource collections and set up central management of e-resources in Network
- With $165,000 from UI System Office, CARLI hired CMC staff at IHLS to help with duplication and other identified issues in Network Zone.
- After continued conversations with Ex Libris, reached new agreement about how to count bibliographic titles

Results: Current bib count is 21.2 million records

- CMC staff continue their work to clean up the Network Zone and improve bibliographic record quality through State Funded grant funds awarded to IHLS.
- I-Share libraries should link your IZ records to the NZ when appropriate; this is key to maintaining a healthy consortial count

I-SHARE: LOOKING AHEAD

New I-Share Libraries – first new libraries to join I-Share since our migration to Alma

Institution	Location	Type
Chicago History Museum	Chicago	Special
Chicago Theological Seminary	Chicago	Private
City Colleges of Chicago	Chicago	Community College
College of Lake County	Grayslake	Community College
Elgin Community College	Elgin	Community College
Illinois College of Optometry	Chicago	Private
Prairie State College	Chicago Heights	Community College
Saint John's College of Nursing	Springfield	Private

The addition of these 8 institutions will bring the total number of I-Share libraries to 96!

CARLI
I-Share

Overview Timeline and Planning for New I-Share Libraries

December 2022 – Finish contract Amendments with Ex Libris

By February 2023 – Tentative Migration schedule developed and shared with new I-Share Libraries

By December 31, 2025 – Full implementation of all new I-Share Libraries

CARLI plans to have two part-time Grad Assistants from the iSchool to help with the New Libraries Project

Illinois SCOERs

Support for the
Creation of
Open
Educational
Resources

Open Illinois = All things CARLI and OER

- "Illinois SCOERs: Support for the Creation of Open Educational Resources," US Department of Education Open Textbooks Pilot Grant
- CARLI OER Commons Hub
- CARLI's Open Education Network membership
- OER Committee activities
- Education and information

https://www.carli.illinois.edu/products-services/collections-management/open-ed-resource-overview

- Launched September 2021

- A customized, branded space on OER Commons - a digital library and collaborative platform

- Showcases OER resources from CARLI Member and other Illinois stakeholders into a publicly accessible location to find OER created and used within the state.

- Governing members may have a presence on the Open Illinois Hub by submitting a form from the CARLI website: https://www.carli.illinois.edu/products-services/oer-commons

Statewide Support for the Creation and Adoption of OER

Statement endorsed by board, many members…

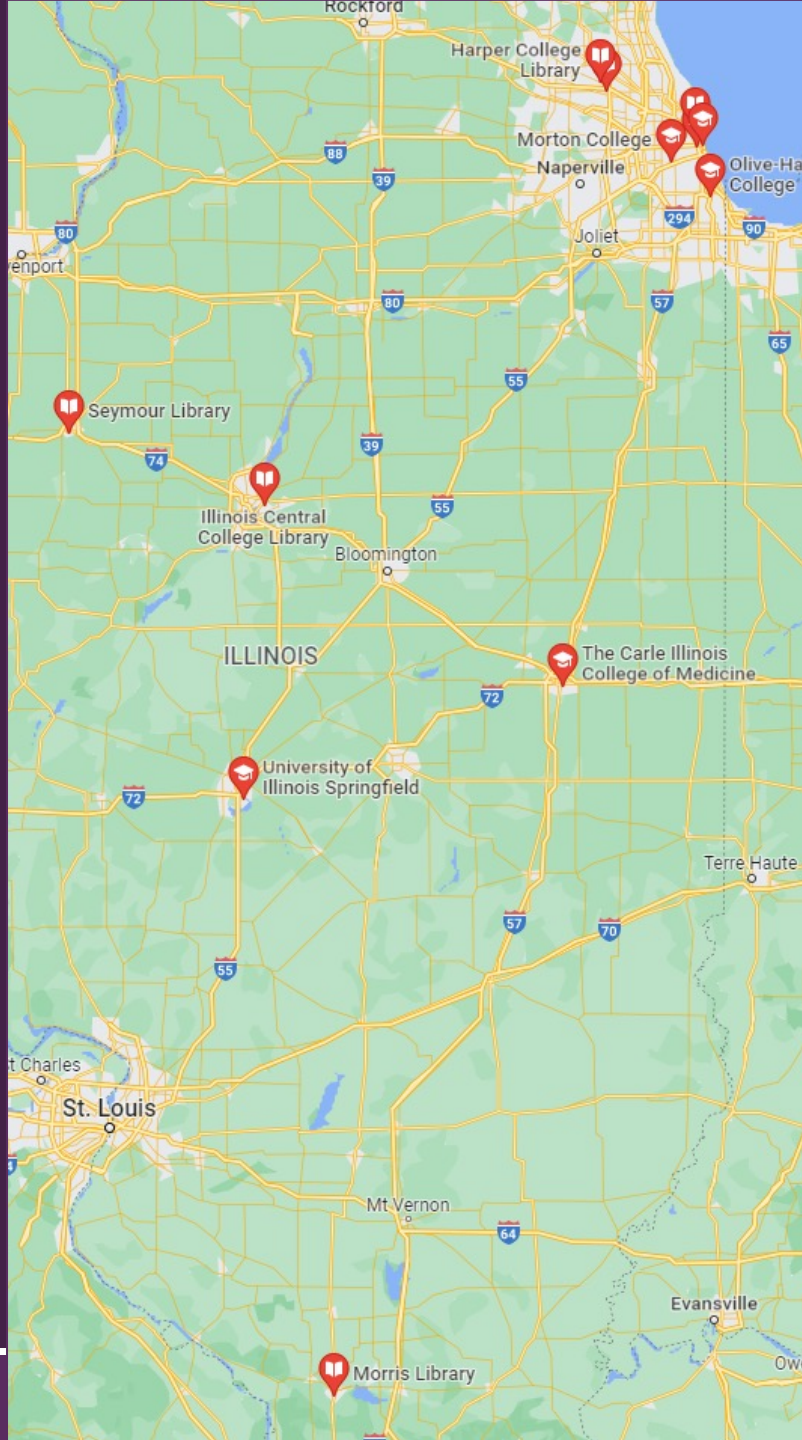https://www.carli.illinois.edu/call-public-comment-and-endorsement-statewide-support-creation-and-adoption-oer

Illinois SCOERs

- $1,085,414

- Competitive sub-awards available in the focus area:

    The Human Condition: Care, Development, and Lifespan

- A minimum of eight peer-reviewed OER textbooks/ancillary materials will be developed

- September 1, 2021 - August 31, 2024

    - Applications for sub-awards were received April 1, 2022

    - Awards May 23, 2022

    - OER textbooks/ancillaries in use by summer 2023

- IL State Library grant for $25,000 for 3D printers

Round One

Nine Subgrant Awards totaling $493,902.55

Thirteen institutions

Statewide representation

Chemistry

Roosevelt University, DePaul University, and **Harper College**, "Development and Implementation of Open-Access Problems and Activities for Health-Focused Chemistry Courses"

Nursing/Health

Illinois Central College, "Nurse Assistant Training OER"

University of Illinois Chicago, "Advancing Open Educational ReSources and Visual Pedagogy for DIverRse StudEnts: ASPIRE"

University of Illinois Urbana-Champaign Carle College of Medicine and **Knox College**, "The Female Reproductive System and Women's Health Through a Multidisciplinary Lens"

Psychology/Development

City Colleges of Chicago, Olive-Harvey College, "Institutional Strategies for Increasing Student Success: Equity and Open Educational Resources"

Morton College, "Diverse Approach to Language Development"

University of Illinois Springfield, "The Psychology of Exceptional Children"

Physical Therapy

Southern Illinois University Carbondale, "Anatomy and Physiology for Allied Health Professions"

Public Administration

National Louis University, "Cultural Humility in Public Administration"

Instructional Design

- Exploring the Basics of Instructional Design
- Instructional Design and OER
- Creating H5P Interactions

3D Printing

- Getting Started with Your 3D Printer
- Review of 3D Printing
- 3D Printing Using Models

Copyright/Creative Commons

- Copyright Basics and Creative Commons Licensing
- Permissions and Fair Use

Accessibility

- What is Accessibility
- Incorporating Accessibility into Your OER

- Informed we would be made whole in May: total of $2 million
- Announced Round Two in June

  https://www.carli.illinois.edu/products-services/collections-management/ILSCOERs-NFO-Round2
- Application Workshops
- MeetGreetCollaborate events
- Completed applications were due November 1, 2022, to mleigh@uillinois.edu

CARLI OER Committee

2021-2022 Activities

Members

- Amber Burtis, 2021-2024, Southern Illinois University Carbondale
- Denise Cote, 2021-2022, College of DuPage
- Catherine Galarza-Espino, 2021-2023, Morton College
- Kim Hale, 2021-2022, Columbia College Chicago
- Daniel Matthews, Co-chair, 2020-2024, Moraine Valley Community College
- Christina Norton, 2021-2022, Bradley University
- Tineka Scalzo, 2021-2024 City, Colleges of Chicago
- Janet Swatscheno, 2020-2022, University of Illinois Chicago
- Chris Sweet, Co-chair 2020-2023, Illinois Wesleyan University
- Tamara Townsend, 2021-2023, City Colleges of Chicago

CARLI Board Liaisons:

CARLI Staff:

- Karen Janke, Erikson Institute
- Jacob Jeremiah, Oakton Community College

- Anne Craig
- Elizabeth Clarage
- Michele Leigh
- Nicole Swanson

Activities

- **Understanding and Promoting Open Educational Resources Workshops**
- **OER Faculty Workshop**
- **OER Commons and the Open Illinois Hub**
- **Open Education Network: Certificate in OER Librarianship Program**
- **Open Education Week**
- **<u>Open Pedagogy Series</u>**
  - *Workshop I: Introducing Open Pedagogy: From Open Resources to Equitable, Student-Centered Practices*
  - *Workshop 2: Implementing Open Pedagogy: Outreach and Advocacy for Developing Faculty Partnerships*

Activities (Cont.)

- **OER Success Stories**
- **OER Office Hours**
  - Publisher Response to OER
  - Engaging Faculty Through a Community of Practice
  - Funding for OER
  - Faculty and Student Collaborations
  - OER and Accessibility
  - Designing Faculty Incentive Programs for OER
- **CARLI U.S. Department of Education Open Textbook Pilot Grant Application: SCOERS Grant**
- **Statement to CCM Task Force**

2021-2022 Public Services Committee

Controlled Digital Lending project

– Survey on library usage of CDL (December 2021)

 • 41 responses – seven libraries had utilized CDL

– Interviewed six respondents about their library's CDL experiences

– Developed a [Resource Guide](#)

 • definitions and background

 • introductory resources

 • position statements

 • implementation

 • legal considerations

 • future

– Hosted a Panel Discussion and Q&A (April 22, 2022)

 • Panelists: Devin Savage, Leslie Starasta, Jennifer Sauzer

1. Take a few minutes to consider the Firestarter Questions on your own (answer them online if you'd like!)
2. Discuss the questions with others at your table
3. Choose a reporter to report to the group

https://www.surveymonkey.com/r/CARLI2023

1. What would you name as CARLI's core values?
2. What's great about CARLI *today*?
3. Name the top 2-3 things that CARLI does for your library.
4. Are there services or programs that CARLI should start to build now for the future?
5. What do you see as CARLI's most important role in 2023 and beyond?