<table>
<thead>
<tr>
<th>Name</th>
<th>Constituency</th>
<th>Term</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spencer Brayton</td>
<td>Community Colleges</td>
<td>2019-2022</td>
<td>Waubonsee Community College</td>
</tr>
<tr>
<td>Anne Craig</td>
<td>Ex Officio</td>
<td></td>
<td>CARLI</td>
</tr>
<tr>
<td>Rebecca Donald</td>
<td>Private Institutions</td>
<td>2021-2024</td>
<td>Trinity International University</td>
</tr>
<tr>
<td>Karen Janke</td>
<td>Private Institutions</td>
<td>2019-2022</td>
<td>Erikson Institute</td>
</tr>
<tr>
<td>Jacob Jeremiah</td>
<td>Community Colleges</td>
<td>2020-2023</td>
<td>Oakton Community College</td>
</tr>
<tr>
<td>Taran Ley</td>
<td>Public Universities</td>
<td>2020-2023</td>
<td>Southern IL Univ School of Medicine</td>
</tr>
<tr>
<td>Dallas Long</td>
<td>Public Universities</td>
<td>2021-2024</td>
<td>Illinois State University</td>
</tr>
<tr>
<td>Greg McCormick</td>
<td>Ex Officio</td>
<td></td>
<td>Illinois State Library</td>
</tr>
<tr>
<td>Matt Ostercamp</td>
<td>Private Institutions</td>
<td>2020-2023</td>
<td>North Park University</td>
</tr>
<tr>
<td>Pattie Piotrowski</td>
<td>Public Universities</td>
<td>2019-2022</td>
<td>University of Illinois Springfield</td>
</tr>
<tr>
<td>Shannon Pohrte</td>
<td>Community Colleges</td>
<td>2021-2024</td>
<td>Elgin Community College</td>
</tr>
<tr>
<td>John Pollitz</td>
<td>Public Universities</td>
<td>2021-2022</td>
<td>Southern Illinois University Carbondale</td>
</tr>
<tr>
<td>Marianne Ryan</td>
<td>Private Institutions</td>
<td>2021-2022</td>
<td>Loyola University Chicago</td>
</tr>
<tr>
<td>Sharon Silverman</td>
<td>Community Colleges</td>
<td>2021-2022</td>
<td>City Colleges of Chicago</td>
</tr>
</tbody>
</table>
Sarah M. Zehr, PhD
Assistant Vice President for Academic Affairs
Office of the Executive Vice President/Vice President for Academic Affairs
University of Illinois System
Ensure adequate, secure, and stable funding for CARLI
Members:
• Fred Barnhart, Northern Illinois University
• Karen Janke, Erikson Institute
• Jacob Jeremiah, Oakton Community College
• Tammy Kuhn-Schnell, Lincoln Land Community College
• Dennis McGuire, Columbia College Chicago
• Thomas Teper, University of Illinois Urbana-Champaign

CARLI Staff:
• Margaret Chambers
• Anne Craig
• Timothy David
• Diane Day
• Kristine Hammerstrand
## CARLI REVENUE SOURCES FY22

<table>
<thead>
<tr>
<th>Source</th>
<th>FY2021</th>
<th>FY2022</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>University of Illinois (Allocation from State of IL appropriation)</td>
<td>$3,524,292</td>
<td>$3,524,292</td>
<td>$0</td>
</tr>
<tr>
<td>Membership Fees</td>
<td>$402,613</td>
<td>$465,525</td>
<td>$62,912</td>
</tr>
<tr>
<td>I-Share Assessments</td>
<td>$1,785,312</td>
<td>$1,838,848</td>
<td>$53,536</td>
</tr>
</tbody>
</table>

### Pass-through revenue

<table>
<thead>
<tr>
<th>Source</th>
<th>FY2021</th>
<th>FY2022</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subscriptions to databases <em>estimated for FY22</em></td>
<td>$14,400,698</td>
<td>$14,000,000</td>
<td>$(400,698)</td>
</tr>
<tr>
<td>ILDS (Illinois Library Delivery Service) grant (IL State Library)</td>
<td>$856,000</td>
<td>$902,420</td>
<td>$46,420</td>
</tr>
<tr>
<td><em>estimated for FY22</em></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Enhance collaboration among libraries by identifying, nurturing, and supporting services and programs that can best be provided at scale.

Provide resources/services/tools for discovering and optimizing information resources and collections.
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
Illinois SCOERs: Support for Creation of Open Educational Resources

https://www.carli.illinois.edu/products-services/collections-management/IllinoisSCOERs

• $1.08 million, three-year grant from the US Department of Education

• Michele Leigh, Project Director, hired October 4

• Competitive sub-awards will be available in subjects in the focus area: “The Human Condition: Care, Development, and Lifespan”

• Applications available after December 1

• A minimum of eight OER textbooks/ancillary materials will be developed for introductory classes

• $25,000 grant from Illinois Secretary of State for 3D printers

• Join our email list! https://lists.carli.illinois.edu/cgi-bin/mailman/listinfo/il-scoers
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

Thank you to Anne Chernaik, Dan Matthews, and the OER Committee for their help in the hub design and implementation.

Open Illinois OER Commons Hub: https://www.oercommons.org/hubs/openillinois
DISTINGUISHED EMPLOYEE LEADERSHIP AND TEAM AWARD (DELTA)

- Demonstrates and models attributes of successful high performing project teams.
- Provides value added results.
- Communicates and manages expectations around project timing and expected results.
- Engages stakeholders in their sponsorship role to provide the resources (talent, tools, and facilities) to complete the project team engagement.
- Delivers results that at minimum meet and potentially exceed expectations.
CARLI DELTA RECIPIENTS

CARLI I-Share
Migration Team

• Deborah Campbell
• Christopher Delis
• Gordon Fellows
• Jessica Gibson
• Denise Green
• Kristine Hammerstrand
• Amy Maroso
• Jennifer Masciadrelli
• Todd Pavlik
• Christopher Saunders
• Theodore Schwitzner
• Nicole Swanson
• Bradley Woodruff
CARLI OFFICE: 25 FTE

Anne Craig, Senior Director

Open Illinois
• Michele Leigh, Senior Coordinator, Open Illinois

MEMBERSHIP AND COMMUNICATIONS
Margaret Chambers, Director, 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, Delivery Program Administrator/Accountant I
• Katrina Little, Accounting Associate

COLLECTIONS SERVICES
Elizabeth Clarage, Director, Collections Services

Jenny Taylor, Assistant Director, Electronic Resources
• Nicole Ream-Sotomayor, Senior Electronic Resources Coordinator
• Denise Green, Senior Library Services 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, Senior Library Services Coordinator
• Amy Maroso, Senior Digitization Coordinator
• Jennifer Masciadrelli, Senior Project Management Coordinator
• Adrienne Radzvickas, Library Services Coordinator
• Ted Schwitzner, Senior Library Services Coordinator
## WILEY/OXFORD EBOOK PROJECT: FUNDING AND ACCESS

<table>
<thead>
<tr>
<th>Three-year project funded by</th>
<th>FY21</th>
<th>FY22</th>
<th>FY23</th>
</tr>
</thead>
<tbody>
<tr>
<td>CARLI consortial funds ($760,000)</td>
<td>Grant plus crowdfunding</td>
<td>Crowdfunding; securing information now</td>
<td></td>
</tr>
<tr>
<td>• $125,000 SOS/ISL Grant</td>
<td>• $330,000 from 70 members ($500-$40,000)</td>
<td>Deliver info to members around January 2022</td>
<td></td>
</tr>
</tbody>
</table>

### Access Wiley and Oxford ebooks

No additional fees for:
- Unlimited access for all CARLI Governing Members
- May be used as course materials or for course reserves
- Direct links may be embedded into course management systems

<table>
<thead>
<tr>
<th></th>
<th>FY21</th>
<th>FY22</th>
<th>FY23</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>July 2020-June 2021</td>
<td>July 2021-June 2022</td>
<td>July 2022-June 2023</td>
</tr>
<tr>
<td>Content available</td>
<td>FY21</td>
<td>FY22</td>
<td>FY23</td>
</tr>
<tr>
<td>-------------------</td>
<td>------</td>
<td>------</td>
<td>------</td>
</tr>
</tbody>
</table>
| ~3,000 Wiley Online Books  
  • Published between 2017-2021 | ~23,000 Wiley Online Books  
  • All online books on platform | ~3,200 Oxford Scholarship Online ebooks  
  • Published between 2018-June 2022  
  • Nine Subject Collections: Biology, History, Law, Music, Political Science, Psychology, Religion, Social Work, and Sociology | Working with Wiley/Oxford for options now |
| Oxford Scholarship Online ebooks and all titles available for 18 Partner Presses  
  • Published between 2018-June 2021 | | | |
## Purchase ebooks
(CARLI and members)

### Funding used for:
- Purchases made from most heavily used items & newer titles
- Members given opportunity to purchase ebooks at negotiated rate
- CARLI has perpetual access to purchased titles with unlimited use

<table>
<thead>
<tr>
<th>FY21</th>
<th>FY22</th>
<th>FY23</th>
</tr>
</thead>
<tbody>
<tr>
<td>July 2021</td>
<td>July 2022</td>
<td>July 2023</td>
</tr>
</tbody>
</table>

### Number purchased for perpetual access
- 3,735 titles
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 provided 702 paid registrations to ELUNA Learns 2020 and 2021 sessions for members

• CARLI staff presented 85 topical webinars between July 2020-June 2021 on Alma and Primo VE including:
  • Open Office Hours
  • Tech Services and Resource Sharing topical sessions
  • Recap sessions following Ex Libris training webinars

• CARLI staff held hundreds of direct conversations with members on Alma configurations and settings
• Voyager resource sharing suspended March 2020
• Alma launched June 24, 2020
• Alma AFN (Automated Fulfillment Network) resource sharing enabled as libraries were able to provide service
  • 52 institutions by August 17, 2020
  • 77 institutions by November 1, 2020
  • 83 institutions by February 1, 2021
• Today, all 89 I-Share libraries have AFN enabled to the level appropriate for their institution
I-SHARE 2020-2021: A YEAR OF SETTLING IN AND “RIGHT-SIZING”

• Implementing single sign-on for Alma and Primo VE
  • 69 I-Share institutions (24 non-I-Share institutions) using OpenAthens (CARLI pays for through June 2023)

• Establishing data feeds for patron records
  • 74 participants successfully implemented and running Alma SIS (Student Information System) synchronizations

• Learning how to make use of Alma and Primo VE’s abilities to manage and optimize discovery of e-resources as well as physical resources, both at the institution and consortium level

• Deduplicating bib records and eliminating unused records
CARLI staff know that this project is a distraction that your staff had not planned for.

Consequently, CARLI took an unprecedented step for our consortium to contract external cataloging staff to perform as much of the data work as possible.

The CARLI Office staff identify records that can be deleted/merged/or moved to Network Zone records, and provide these reports to I-Share library staff to review, saving library staff the time and effort of finding these data.

I-Share libraries may opt to do the data work themselves or have CARLI do it for them at no charge to the library.

Every I-Share library is different, so we are offering consultation sessions with individual libraries about their data cleanup options. Contact us to schedule one for your library!
CARLI I-Share Alma Title Count Reduction Project

Revised: November 1, 2021

Overview

I-Share libraries need to reduce our total number of Bibliographic Titles. CARLI’s Alma subscription currently allows us to have over 46 million titles across the entire consortium, i.e., 89 Institution Zones (IZ) plus the Network Zone (NZ). We are currently over our allowance, but we know many duplicates were introduced as the result of our migration to Alma from multiple sources, including Voyager, SFX, and other e-resource systems like 360.

Ex Libris and CARLI have identified three areas where we have an excess of records that we can reduce by performing record clean-up:

1. Most I-Share libraries have activated electronic resources in their IZs that are identical to collections that already are or may be provided centrally by CARLI via the NZ. This carryover of practices from Voyager isn’t unusual, but it is the largest source of duplicate titles across the consortium.

   • Our first priority will focus on Open Access and Free E-Collections that are shared from the NZ. As freely-available resources, these resources do not require patron authentication nor acquisition transactions, and do not need to be in the IZ.

https://www.carli.illinois.edu/products-services/i-share/title-count-reduction/project-overview
I-Share Title and Named Users Overage Announcements

Revised: 10/26/2021

Back to the CARLI I-Share Alma Title Count Reduction Project Home Page

This page contains the text of announcements sent to CARLI I-Share email lists about the Title Count Reduction or Named Users Overage projects with the most recent announcement at the top and older announcements below. Please note that past announcements may be superseded by new information as work continues, so consult the current CARLI webpages on the Alma Title Count Reduction Project and the Named Users for the most current information!

Title Count Reduction Project Announcements

I-SHARE ALMA TITLE COUNT REDUCTION-FORMERLY FULLY SUBSIDIZED ASP E-COLLECTIONS—PLEASE RESPOND TO SURVEY BY NOV 1

To: I-Share Liaisons and I-Share Directors of 29 I-Share Institutions

This message is aimed at I-Share Directors and I-Share Liaisons at institutions that have the "Black Thought and Culture" and "Women and Social Movements in the United States, 1600-2000" collections from Alexander Street Press.

https://www.carli.illinois.edu/products-services/i-share/title-count-reduction/announcements
Establish and communicate the value proposition for academic and research libraries in Illinois
Added a one-year, no-cost extension to “CARLI Counts: Analytics and Advocacy for Service Development”

Allows for a Cohort 3 (now in session!)

Funded by a $243,885 Institute of Museum and Library Services Laura Bush 21st Century Librarian Program grant
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

Coming this spring for your vote
REMINDER ABOUT COMMUNICATIONS

https://www.carli.illinois.edu/membership/mem-libs
ALL ABOUT CARLI
Supporting Illinois’ Academic Libraries for more than 40 Years

CARLI is a membership organization for libraries, providing services at scale to Illinois academic and research libraries.

What is CARLI’s value to libraries and to Illinois higher education? CARLI frees dollars within each member organization—including each University of Illinois campus—to do mission-critical work. The University of Illinois System supports CARLI and reaffirms the central role that education and higher education can play in promoting the public good for the entire State of Illinois and beyond.

CARLI is unique in the United States, empowering academic research in the state of Illinois and fueling innovation. CARLI gives Illinois students and our state a competitive advantage.

What do CARLI members receive?
- No-cost subscriptions to academic research databases
- Eligible to participate in I-Share, the online catalog
- E-resources price negotiation and contract brokering
- No-cost 24-hour delivery of library materials
- No-cost training for library staff

CARLI serves students from diverse backgrounds, including underrepresented groups and first-generation college students.

CARLI serves 90% of Illinois’ higher education students and faculty.

Who are CARLI members?
- ALL Illinois’ public universities
- ALL Illinois’ community colleges
- 67 of Illinois’ 91 private colleges and universities
- 8 special research libraries like the Abraham Lincoln Presidential Library, the Illinois State Library, and the Newberry Library

CARLI’s 127 Member Libraries

CARLI serves as a coordinator for important initiatives like creating open educational resources, assessment of library impact, submitting grant requests, and providing training and education for members.

CARLI helps make Illinois academic and research libraries world-class by providing:
- E-resources (articles, maps, images, books) from all disciplines
- Print books accessible to students from all over the world
- Trained staff ready to focus on students’ needs

What are CARLI’s FY21 revenue sources?
- University of Illinois System Office: $3.5 million
- CARLI Membership Fees and assessments for optional services: $2.2 million
- Pass-through revenue:
  - Subscriptions to databases: $14.5 million
  - Delivery grant from the Secretary of State/Illinois State Library: $855,000

What do members say about CARLI?
- CARLI links the profession and is dependent on to enrich professional lives.
- CARLI helps libraries level the playing field.
- 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 members a springboard to shape important library services.
- The relatively modest investment the State of Illinois and members make impacts millions statewide.
- CARLI has tremendous potential to coordinate strategic best practices.
- Members need a healthy CARLI to stay vibrant locally; CARLI’s success is inseparable from member libraries’ success.

I-Share, the Library Services Platform
The I-Share library services platform serves as the online public catalog for 89 CARLI member libraries, including the three University of Illinois libraries.

I-Share is more than a catalog; it enables discovery and sharing of all materials among libraries. Especially with recent campus reductions to members’ budgets, that sharing is essential to meet student and faculty research needs.

I-Share is named as CARLI’s most valued service by members
- Resource sharing benefits impact all Illinois residents
- The power of the shared catalog:
  - 38 million items, a shared collection that ranks among the world’s largest research libraries
  - Collections throughout the state delivered in 24 hours
- I-Share libraries could not operate a separate system for a comparable cost
- Staff, software, administration, staff education
- I-Share familiarity:
  - Transferring students move to new Illinois schools with an advantage

Without I-Share
- Students and faculty would be immediately and adversely impacted...
  - Campuses would be forced to buy or borrow needed materials at additional expense.
  - Fulfillment of research needs would take noticeably longer.
Encourage innovation in skills, services and programs, in all aspects of CARLI libraries
CARLI partners with nine 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

• 139 total programs offered to CARLI Members from all PDA Consortia in FY21 and FY22 to date; 20 CARLI-Sponsored Programs:
  • 2,369 registrants
  • 1,396 live attendees
  • 673 views of recordings

• Upcoming CARLI-Sponsored Programs:
  • January 19: The Before and After: Returning to Work with COVID Restrictions Still in Place with Joan Schuitema
  • January 25: Working with Fire Professionals with Chief John High
  • February 9-11: Directors’ Institute
  • March 1: Save the Date for a program with Emily Knox
  • March 8 and 15: two-part Open Pedagogy Series with Will Cross
More information to come!

February 9-11, 2022
9 a.m.-noon
Fiscal Year 2021 CARLI Research Funding Program

- *Caring for the Library Outsider: a Pedagogy of Care for Academic Librarians*

- Rebecca Donald, Trinity International University
  - Interviewed 26 librarians (16 were CARLI members) about a feminist pedagogy of care for academic librarians
  - Currently compiling the results of these interviews
  - Themes of note include:
    - The challenges of caring for students during the COVID-19 pandemic
    - A passion for DEI (diversity, equity, and inclusion) initiatives in libraries
    - Library directors considering how to care well for their staff

Project results will be presented in a webinar for CARLI in the coming year.
Fiscal Year 2021 CARLI Research Funding Program

• Zotero Promotion and Support: Promote Best Practices and Enable Integration

• David Stern, Saint Xavier University
  • Grant created a clearinghouse of best practices, teaching materials (videos, screen shots, guides), and tips and tricks.
  • Materials available from: https://www.carli.illinois.edu/products-services/pub-serv/zotero#overlay-context=prof-devel/fundedresearchprojects
  • Grant will also mail a set of six posters (containing the screen shots that are available on the web site) to CARLI libraries upon request.
    • Send your complete mailing address to: stern@sxu.edu
ONGOING AND ON CARLI’S HORIZON

• I-Share title and user cleanup project
• Illinois SCOERs program
• CARLI Counts
• Ebooks crowdfunding project for FY23
• Bylaws update
• Continued work on the Shared Institutional Repository
• Professional Development Alliance planning and looking at topics for CE programs
• Evaluating needs based on new types of work/interaction
Anne Craig
Senior Director, CARLI
The Consortium of Academic and Research Libraries in Illinois
100 Trade Centre Drive, Suite 303
Champaign, IL 61820
217-300-0375
abcraig@uillinois.edu
Time for your questions!