

FISCAL YEAR 2020 ANNUAL REPORT

JULY 1, 2019 - JUNE 30, 2020

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 of 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

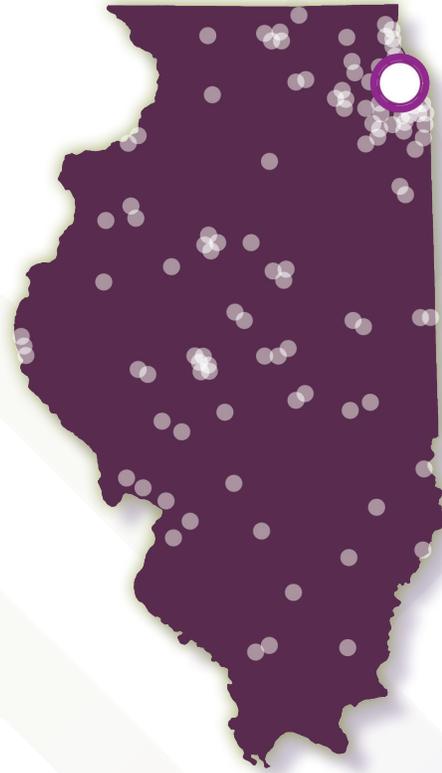
GOAL: Identify new services/programs that are scalable and replicable

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
- Hosted 45+ training events, open houses and webinars sponsored by CARLI Committees and Task Forces, with 1,932+ attendees from 123 member libraries. Events included: “Librarian Superpowers: Librarians Harnessing Copyright for the Public Good,” “Smart Decisions: Using Standardized Rights Statements for Digital Collections,” “CARLI Member Libraries and the 2020 Census: Promoting the Count,” and “Act Up: Evaluating Sources and Pushing Against Privilege”
- 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)

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 • OpenAthens
Discretionary purchases	<ul style="list-style-type: none"> • Subscription e-resources and databases
No member pays	<ul style="list-style-type: none"> • 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

Chigago 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

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

FY 2020 AFFILIATE MEMBERS

Fox College

Rasmussen College Rockford

Leadership

CARLI FY 2019 BOARD OF DIRECTORS

Fred Barnhart	Public Universities	Northern Illinois University
Spencer Brayton	Community Colleges	Waubensee 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

Jenny Taylor, Senior Coordinator Electronic Resources

Nicole Ream-Sotomayor, Senior Coordinator Electronic Resources

BUSINESS AND FINANCE SERVICES

Diane Day, Fiscal Officer

Tim David, Delivery Program Administrator/
Accountant

Katrina Little, Account Technician II

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

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

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

COLLECTIONS SERVICES

Elizabeth Clarage; Director, Collections Services

E-RESOURCES

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