

## **Annual Report**

### **Fiscal Year 2022 (July 1, 2021-June 30, 2022)**

#### **Mission and values**

In FY22, the Diversity, Equity, and Inclusion Task Force revised the CARLI mission and values. These revisions, along with amendments to the CARLI Bylaws are set for a membership vote in Fall 2022.

#### **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

#### **Open Illinois Initiative**

The CARLI Open Illinois Initiative is a commitment to facilitate members' use and support of Open Educational Resources (OER) especially training, advocacy, and coordination of cooperative efforts for the benefit of Illinois higher education students.

#### **Illinois SCOERs (Support for the Creation of Open Educational Resources)**

The University of Illinois System/CARLI was awarded a three-year, \$1.08 million grant from the US Department of Education's Open Textbooks Pilot Program, a competitive grant program based on US Senate Majority Whip and Illinois Senator Richard Durbin's Affordable College Textbook Act. The grant will fund Illinois SCOERs (Support for Creation of Open Educational Resources), a program that will provide access to open textbooks and personalized learning tools for entry-level courses in high-demand health care and human development career paths.

In Round One, CARLI was able to fund nine innovative projects representing thirteen institutions across the state. Among the institutions are community colleges, state

universities, and private colleges and universities. Two of the nine grants represent multi-institutional collaborations.

The [nine Round One Illinois SCOERs Subgrant Awards](#) totaling \$493,902.55 are:

1. City Colleges of Chicago, Olive-Harvey College, "Institutional Strategies for Increasing Student Success: Equity and Open Educational Resources," \$60,000
2. Illinois Central College, "Nurse Assistant Training OER," \$59,572.80
3. Morton College, "Diverse Approach to Language Development, " \$23,220
4. National Louis University, "Cultural Humility in Public Administration, " \$58,922.23
5. Roosevelt University, DePaul University, and Harper College, "Development and Implementation of Open-Access Problems and Activities for Health-Focused Chemistry Courses, " \$59,961.60
6. Southern Illinois University Carbondale, "Anatomy and Physiology for Allied Health Professions, " \$59,254.20
7. University of Illinois Chicago, "Advancing Open Educational ReSources and Visual Pedagogy for DIVERse StudENTS: ASPIRE, " \$59,999.40.
8. University of Illinois Springfield, "The Psychology of Exceptional Children, " \$52,982.64
9. University of Illinois Urbana-Champaign (Carle Illinois College of Medicine) and Knox College, "The Female Reproductive System and Women's Health Through a Multidisciplinary Lens, " \$59,989.68

### **Open Illinois Hub on OER Commons**

CARLI launched the [Open Illinois Hub](#) on OER Commons in FY22. The Open Illinois Hub facilitates the use of Open Educational Resources (OER) and supports training, advocacy, and coordination of cooperative efforts for the benefit of members of the Consortium of Academic and Research Libraries in Illinois (CARLI), and other Illinois stakeholders. This centralized repository provides materials helpful to academic and research institutions in developing OER and advocating for adoption of OER on their campuses to reduce students' costs.

The Open Illinois Hub is a customized, branded resource on OER Commons where our network of users can create and share their locally created open educational resources and collections, have an institutional presence, or work collaboratively, and share news and events associated with a project or organization. By combining resources from many CARLI member institutions into a seamless environment, faculty, staff, students, and the public are able to search across Illinois institutions and collections.

### **CARLI's support for OEN's Certificate in OER Librarianship Program 2021 Recipients:**

- Amber Burtis, Southern Illinois University Carbondale
- Denise Cote, College of DuPage
- Cari Didion, Governors State University
- Catherine Galarza-Espino, Morton College
- Lily Morgan, Governors State University

- Christina Norton, Bradley University
- Dee Anna Phares, Northern Illinois University

### **I-Share**

CARLI Staff presented nearly 50 topical webinars in support of I-Share, this includes our Open Office hours, Tech Services Q&A, and the Let's Talk about Fulfillment sessions.

CARLI Staff resolved over 2,000 support inquiries about Ex Libris Alma/Primo VE during FY22. Additionally, over 100 cases were opened with Ex Libris to address Alma and Primo VE related issues on behalf of our I-Share members.

CARLI continued its support of ELUNA Learns registrations for members, providing 355 registrations for staff at I-Share member libraries.

Following CARLI's June 2020 migration to Ex Libris Alma/Primo VE, CARLI turned its attention to record cleanup. The University of Illinois System Office provided funds for CARLI to focus effort on cleanup and named user reduction through a contract with the Cataloging Maintenance Center at the Illinois Heartland Library System.

### **CARLI Counts**

CARLI Counts is a continuing education library leadership immersion program that 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. Program participants learn how to use local library data analytics in alignment with institutional data, goals, and strategic priorities to improve their services and demonstrate their value.

CARLI Counts Cohort 3 was held in 2021. This was the first cohort to be held entirely virtually. Presentations of the teams' projects were showcased at the November 2022 CARLI Annual Meeting. CARLI Counts is supported by a Laura Bush 21<sup>st</sup> Century Librarian Grant from the Institute of Museum and Library Services and CARLI.

### **Professional Development Alliance of Library Consortia**

CARLI's second year participating in the Professional Development Alliance of Library Consortia (PDA) presented members with new opportunities for education, training, and awareness that would otherwise not have been possible. The PDA is a cooperative program of ten U.S. library consortia to bring no-cost virtual continuing education to library staff across the country. CARLI members were presented with the opportunity to attend 274 programs offered by all PDA members since this collaboration began. 5192 library staff registered specifically for 46 programs hosted by CARLI.

### **Ebook Program**

During CARLI's Ebook Program in FY22, 70 members contributed \$452,500. This funding purchased perpetual access to 1,835 Wiley Online Books and 636 Oxford University Press Ebooks. During the project year, members had access to 23,000+ Wiley Online Books that included all subjects as well as all years available within the Wiley Online Library. All titles had unlimited access for CARLI members through June 30, 2022, and could be used as course

materials or for course reserves. Direct links could be embedded into course management systems.

### **CARLI Scholarship**

The CARLI Scholarship helps to grow the profession by providing 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. Scholarships may be awarded for both on-campus and/or distance education programs. For information, or to apply, visit the [CARLI Scholarship web page](#).

FY22 recipients:

Jacqueline Mann, Loyola University Chicago; Abigail Mastin, University of St. Francis; and Kate Swope, Northern Illinois University. Each received a \$1,000 CARLI Scholarship for the 2021-2022 academic year.

### **Building Diversity Graduate Assistantships**

CARLI's Building Diversity Assistantship Program (BDGAP) seeks to improve equity, diversity, and inclusion in Illinois academic libraries by supporting persons from traditionally underrepresented minority groups who are enrolled in the master's degree program in Library and Information Science at the University of Illinois Urbana-Champaign with positions at CARLI member libraries. The assistantships, being awarded for the first time in FY22, provide a small stipend and tuition.

Funding for the program for academic years 2022/2023 and 2023/2024 is provided by CARLI and the University of Illinois System. CARLI member libraries hosting graduate assistants through CARLI for the 2022/2023 academic year are the Chicago Theological Seminary, Loyola University Chicago, Moraine Valley Community College, and the University of Illinois Chicago.

Sarah Rebecca Velazquez Gaglio and Wardah Mohammed are the recipients of the [Building Diversity Graduate Assistantships](#) for the 2022/2023 academic year. The assistantships will ultimately provide experience, mentoring, and networking to participants with the goal of increasing the number of staff members from underrepresented groups at Illinois' two and four-year public and private college and university libraries.

### **CARLI revenue**

	<b>FY22</b>	<b>Change from FY21</b>	
University of Illinois (Allocation from State of IL appropriation)	\$3,524,292	\$0	0%
Membership Fees	\$465,525	\$62,912	15.6%
I-Share Assessments	\$1,838,848	\$53,536	3%

### **Pass-through revenue**

Subscriptions to databases for FY22	\$14,650,642	\$215,944	1.5%
ILDS (Illinois Library Delivery Service) grant (Illinois State Library)	\$880,438	\$24,421	2.9%

## I-Share Assessments

CARLI's Assessment Task Force recalculated the I-Share formula in FY22. Prices were set through FY27.

CARLI's Funding Principles were established:

- Ensure that CARLI members have at least 24 months' notice for their individual fee/assessment rates.
- Recalculate rates every three years to avoid drastic changes in rates.
- Use data that are easily obtainable from reliable sources.
- Buffer members' increases with escalating periods to reach any new amount gradually.

## CARLI Digital Collections

[CARLI Digital Collections](#) (CDC) is a repository for digital content created by member libraries, or purchased by CARLI for use by its members, run on OCLC's CONTENTdm software platform. CARLI Digital Collections provides access to myriad special collections, including images, printed and manuscript materials, sound recordings, and more totaling 3.1 TB. Use of CARLI Digital Collections and CONTENTdm is offered for free to CARLI member institutions. Of the 353 collections in CDC, 13 were added in FY2022, including collections from two new CARLI institutions that had not contributed to CDC until this year.

## DPLA and IDHH

CARLI continued its work on the Illinois Digital Heritage Hub, the Illinois hub at the Digital Public Library of America.

In FY22, IDHH contributed over 420,000 metadata records to DPLA 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)

## Manifold Pilot

The CARLI Office is pleased to be one of seventeen participants in the Open Education Network's (OEN) newly launched Manifold Pilot. In this pilot, librarians, faculty, and scholars at participating institutions and organizations will experiment with [Manifold](#), an open-source publishing workflow, developed in collaboration between the CUNY Graduate Center, the University of Minnesota Press, and Cast Iron Coding. Manifold may be used for a variety of open educational publishing practices, as seen in examples from [California Digital Library](#) and [Affordable Learning Georgia](#).

The pilot will provide participants with an extended opportunity to work on a range of creative open education publishing, pedagogy and curation projects to meet the local needs of their communities. During the pilot, CARLI staff will learn how to use the platform to create an open textbook.

The OEN was selected as one of six organizations to join the Manifold community in 2022 with a grant-funded support package, thanks to generous funding from The Andrew W. Mellon Foundation. The OEN will receive one year of grant-funded managed hosting, training, and support. The OEN has committed to providing an additional year of Manifold access, through March 2024. At the conclusion of the pilot, the group will share what they learn with the broader OEN community and make recommendations as to whether the OEN offers Manifold for community use in the future. CARLI will share this information with the membership.

In addition to CARLI, other pilot participants include these U.S. and Canadian institutions and organizations:

- American Indian Higher Education Consortium
- Butler County Community College
- Colorado State University-Pueblo
- Eastern Kentucky University
- Kwantlen Polytechnic University
- Open Oregon Educational Resources
- Oregon State University
- Texas Tech University
- The Center for Black, Brown, and Queer Studies
- University at Buffalo Libraries
- University of California, Irvine
- University of Hawai‘i Community Colleges
- University of Kansas
- University of Northern Iowa
- University of Southern Maine

### **OpenAthens**

In January 2020, CARLI offered financial support to Governing Members for OpenAthens through the end of FY23. CARLI’s financial support of OpenAthens will end on June 30, 2023. Estimates for FY24 (beginning July 1, 2023) are available from CARLI.

### **2021 University of Illinois System DELTA**

The CARLI I-Share Migration Team was named the recipient of the Distinguished Employee Leadership and Team Award (DELTA). The award:

- 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.

### **Staff changes**

Long-time CARLI staff members Gordon Fellows and Kristine Hammerstrand retired in FY22. Christopher Saunders left CARLI.

Promotions:

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



New staff:

- Michele Leigh, Senior Coordinator, Open Illinois
- Adrienne Radzwickas, Library Services Coordinator

### CARLI FY22 Board of Directors

Name	Constituency	Institution
Spencer Brayton	Community Colleges	Waubensee Community College
Anne Craig	Ex Officio	CARLI
Rebecca Donald	Private Institutions	Trinity International University
Karen Janke	Private Institutions	Erikson Institute
Jacob Jeremiah	Community Colleges	Oakton Community College
Taran Ley	Public Universities	Southern IL Univ School of Medicine
Dallas Long	Public Universities	Illinois State University
Greg McCormick	Ex Officio	Illinois State Library
Matt Ostercamp	Private Institutions	North Park University
Pattie Piotrowski	Public Universities	University of Illinois Springfield
Shannon Pohrte	Community Colleges	Elgin Community College
John Pollitz	Public Universities	Southern Illinois University Carbondale
Marianne Ryan	Private Institutions	Loyola University Chicago
Sharon Silverman	Community Colleges	City Colleges of Chicago

### Other highlights

- The 2021 CARLI's Annual Meeting and Directors' Meeting were held virtually.
- Funded through a CARLI Research Award, CARLI made available Zotero posters for member libraries. Zotero is a free and open-source reference management software to manage bibliographic data and related research materials that allows users to collect, annotate, organize, cite, and share their research materials. PDF versions of the posters are also available for download and/or local printing from the "HELP" section of the [CARLI Zotero instruction clearinghouse](#).
- In FY22, CARLI began the process of migrating to a completely virtual workplace. Following the COVID-19 Pandemic, CARLI staff were practiced in working remotely. CARLI will begin renting office space at the Illinois Heartland Library System in Champaign in February 2023 to have meeting and small group space.
- CARLI completed its migration to all cloud-based services. Server farms were decommissioned in FY22.
- ILDS (the Illinois Library Delivery Service) returned to operations after the pandemic in FY22.
- New contract for Syndetics Unbound from ProQuest. CARLI renewed contracts for the American Mathematical Society, the Association for Community Machinery, Duke University Press, eHRAF, and John Hopkins University Press.