

**APPROVED BY SENATE**  
**05/05/2014**

**LB.14.01**  
May 5, 2014

**UNIVERSITY OF ILLINOIS**  
**URBANA-CHAMPAIGN SENATE**  
Senate Committee on the Library  
(Final; Action)

LB.14.01 Resolution in Support of Continued University Of Illinois Stewardship of CARLI

*WHEREAS*, CARLI (Consortium of Academic and Research Libraries in Illinois) is a statewide consortium providing programs and services for 145 college and university libraries in Illinois and is committed to meeting the information and research needs of their 850,000 students, thousands of faculty and staff; and,

*WHEREAS*, CARLI leads these academic libraries to create and sustain a rich, supportive, and diverse knowledge environment that furthers teaching, learning, and research through the sharing of collections, expertise, and programs; and

*WHEREAS*, CARLI was formed in 2005 from three pre-existing organizations built in part through state budget allocations intended to build infrastructure for statewide book borrowing and joint licensing of electronic content; and

*WHEREAS*, these funds were consolidated in the University of Illinois with the formation of CARLI, and the University has thus incurred certain obligations through the historic process of establishing CARLI; and

*WHEREAS*, CARLI provides the three University of Illinois campuses as well as other colleges and universities core academic services, including the I-Share borrowing service, that would be significantly more expensive to re-create locally; and

*WHEREAS*, the CARLI Board and the UIUC Library Dean urge the University Administration to reaffirm its commitment to maintaining the level of excellent library services that CARLI provides for the academic and research community in Illinois, and the UIUC Senate Committee on the Library concurs; and

*WHEREAS*, the Senate Committee on the Library requests that the University's obligations to CARLI be clear during the new UA annual budget review process and thereafter;

*BE IT THEREFORE RESOLVED* that the Senate of the Urbana-Champaign Campus supports continued University of Illinois stewardship of CARLI and careful attention to the historic and continued role of the University of Illinois in maintaining the level of excellent library services that CARLI provides for the academic and research community in Illinois.

SENATE COMMITTEE ON THE LIBRARY

Mary Mallory, Chair

Stephen Cartwright

James M. Dadabo

Mitchell Dickey

Diana Jaher

Alex Kirlik

Steve Letourneau

Safiya Noble

John Randolph

Amita Sinha

Caroline Szyłowicz

George Ordal

Vaidehi Waman Joshi

## **BACKGROUND**

Illinois academic libraries have acted consortially for over thirty years. Nationally CARLI is considered one of the premiere library consortia.

The University of Illinois serves as CARLI's fiscal and contractual agent under a [Memorandum of Understanding](#) between the Board of Trustees of the University of Illinois and CARLI. CARLI operates as a unit of the [University Office for Academic Affairs](#).

### ***CARLI Statement of Values***

**Cooperation** among academic and research libraries of all types, sizes and missions

**Respect** for the diverse missions and populations served by member institutions

**Recognition** of each member institution's autonomy

**Sharing** the full range of academic library resources effectively and economically

**Free and open access** to all intellectual resources

**Excellence** in providing services and programs

**Innovation** in identifying and implementing collaborative solutions to shared challenges

**Responsiveness** to member needs

**Cost-effectiveness** in the delivery of programs, services, and products

**Careful stewardship** of all CARLI resources

**Protecting the privacy** and security of library records

**Supporting intellectual freedom**

**Advocacy** for academic and research libraries at the local, state, regional and national levels

### ***CARLI Operational/Tactical Priorities***

When the CARLI Board of Directors crafted the organization's strategic priorities in 2007, the consortium was still at a formative stage. Its Strategic Priorities, still in effect, focus on Collaboration and Leadership, Innovation, Resource Sharing, and E-Resources. Since that time, CARLI has matured, established a consistent operational focus, demonstrated its value, and gained the trust of its members. Over the same time period, the external environment has changed dramatically. Nearly unprecedented economic turmoil and ever accelerating technological change confront higher education, in general, and academic libraries, in particular. Since 2010, the CARLI Board has increased emphasis on documenting the value of consortial action to each member institution and to the students and faculty being served. In addition, the following focused priorities will shape the overall planning, development of specific services, and operation of the consortium.

#### **Continue and expand the options for resource sharing**

- Expand the concept of I-Share
- Identify and test direct patron borrowing across disparate integrated library systems (ILS)
- Improve I-Share ILS performance to permit expanded participation
- Reduce costs and enhance the overall quality of library technical services operations
- Rethink/remodel technical services in and among member libraries through collaborative effort
- Emphasize streamlining processes and workflows and maximize use of local data
- Expand access to hidden information resources

#### **Identify staffing needs in member libraries**

- Identify the scale and scope of needed staff expertise and knowledge among CARLI members

- Identify and coordinate opportunities for member libraries to share staff and expertise
- Create financial models for staff sharing

**Establish a proactive research/reporting agenda for CARLI**

- Better utilize the wealth of data already available
- Focus reporting and research on issues that inform library management and decision making
- Ensure adequate follow up and implementation of research findings

**Create a new focus on partnerships with other consortia**

- Seek partnerships and collaborations when appropriate
- Examine parallel functionalities in other consortia
- Emphasize the development of expertise and cost effective operations
- Seek grant funding
- Investigate and aggressively pursue external funding opportunities
- Leverage the funding received from member libraries

**Develop a strategy for print retention that addresses the needs of CARLI various constituencies**

- Clearly define the need and potential for cooperative print retention among CARLI's diverse constituencies
- Determine whether print retention is best addressed in a statewide context, national context, or both
- Determine possible financial models for sharing the cost of new print retention projects.