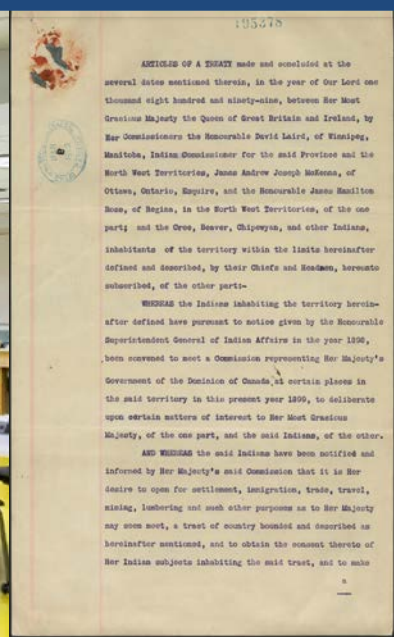




## 2017 ANNUAL REPORT



# Canadian Association of Research Libraries Annual Report 2017

## Contents

President's Message .....	3
Executive Director's Message .....	3
CARL Board .....	4
Highlights from 2017 .....	5
Influencing Policy .....	5
Strengthening Capacity .....	7
Advancing Research.....	8
Measuring Impact .....	11
Member Gatherings .....	12
CARL Distinguished Service to Research Librarianship Award .....	13
CARL Award of Merit.....	13
Portage Annual Update .....	14
Key 2017 Portage Achievements: .....	16
2017 CARL Publications.....	17
CARL Events in 2017 .....	18
Communications .....	18
Operations.....	18
Looking ahead to 2018.....	19
CARL institutions.....	20
University Libraries.....	20
Federal Institutions .....	20
CARL Staff.....	21

## Cover:

*Bibliothèque Université Laval, Exposition - Être femme aujourd'hui*  
Photographer: Marc Robitaille

*Exterior of the Mearns Centre for Learning - McPherson Library*  
Photo credit: University of Victoria

*Ryerson University Library & Archives, Collaboratory. Photographer: Tom Arban.*

*Document: Western Treaty No. 8 - IT 415 (item 1). Colour version*  
*Source: Library and Archives Canada/Department of Indian Affairs and Northern Development fonds/e002996116*

## President's Message

I am pleased to present the 2017 CARL Annual Report.

CARL's mission is to provide leadership on behalf of Canada's research libraries and is driven by a collective desire to enhance research and higher education by promoting effective and sustainable knowledge creation, dissemination, and preservation, and public policy that enables broad access to scholarly information.



In 2017, our members, committee chairs, board and staff, and multiple other stakeholders, made significant progress in all four of our strategic directions – Advancing Research, Strengthening Capacity, Measuring Impact and Influencing Policy. I would like to thank these colleagues for their commitment to uniting the voices and priorities of Canada's research libraries, as reflected in this report. It is thanks to their energy and enthusiasm that 2018 promises to be yet another eventful year.

Donna Bourne-Tyson, CARL President

## Executive Director's Message



2017 was another busy year for CARL, as we continued to make progress on our 2016-2019 Strategic Directions. It was also a year of significant growth for both CARL and Portage, and we welcomed a number of new staff members to support an increasing range of initiatives.

I look forward to expanding on the good work that CARL has done recently advancing scholarly communication, guided by the Roadmap, as well as building research data management capacity through the work of Portage. 2018 will also be an important year with the Parliamentary review of the Copyright Act, and other arising national policy issues that implicate libraries.

As in previous years, it has been a privilege to continue to work closely with library leaders, and I would like to thank our Board of Directors, our strategic committee chairs, and our members for their many contributions.

Susan Haigh, CARL Executive Director



# CARL Board

## **President**

Donna Bourne-Tyson  
Dalhousie University

## **Vice-President**

Jonathan Bengtson  
University of Victoria

## **Treasurer, Atlantic Region Representative**

Lesley Balcom  
University of New  
Brunswick

## **Secretary, Québec Region Representative**

Gylaine Beaudry  
Concordia University

## **Director, Ontario Region Representative**

Vivian Lewis  
McMaster University

## **Director, Western Region Representative**

Gwen Bird  
Simon Fraser University

## **Executive Director**

Susan Haigh



## **Strategic Committee Chairs**

Advancing Research Committee  
*Joy Kirchner* (York University)

Assessment Committee  
*Colleen Cook* (McGill University)

Policy Committee  
*Martha Whitehead* (Queen's University)

Strengthening Capacity Committee  
*Vivian Lewis* (McMaster University)

# Highlights from 2017

CARL committees continued to support the objectives outlined in the Strategic Directions for 2016-2019: *Influencing Policy*, *Advancing Research*, *Strengthening Capacity*, and *Measuring Impact*. Key achievements and activities in each of these areas over the past year are described below.

## Influencing Policy

As in prior years, with guidance from the Policy Committee under the leadership of Martha Whitehead, CARL advocated that more open and equitable access to information, and users' rights in copyright, are fundamental to post-secondary education and advanced research. Our 2017 initiatives included:

- CARL issued two statements on broadband services, one commending Innovation, Science and Economic Development's new investment in remote broadband access, and another commending the Canadian Radio-television and Telecommunications Commission (CRTC) on their new universal service objective.
- CARL also issued a statement on Net Neutrality. Prepared by Julie Morin, it was shared with the Association of Research Libraries (ARL) as an expression of solidarity with their stance on US net neutrality.
- We filed an objection to the Copyright Board to the Proposed Access Copyright Tariff. This work was authored by Mark Swartz with input from legal counsel Howard Knopf.
- On June 1st, Donna Bourne-Tyson and Susan Haigh appeared at the Standing Committee on Access to Information, Privacy and Ethics (ETHI Committee) to discuss the Right to be Forgotten.
- CARL prepared and published a statement on Bill C-58 – Access to Information Reform – which was tabled in mid-June.
- Donna Bourne-Tyson and Susan Haigh attended an international meeting organized by Victoria Owen during IFLA in Wrocław, Poland to scope a generic Librarian's Guide to the Implementation of the Marrakesh Treaty.
- CARL issued a response to Global Affairs Canada's consultations on the renegotiation and modernization of the North American Free Trade Agreement, largely focusing on copyright and privacy issues.



*Donna Bourne-Tyson and Susan Haigh appearing at the ETHI Committee*

- In early September, CARL published an infographic, *Fair Dealing: Myths and Facts*. A project led by Lise Brin, with support from a number of copyright specialists from CARL institutions, the new infographic adapted an ARL design, and added new content specific to the use of fair dealing in post-secondary education.
- Mark Swartz joined the CARL team as a part-time Visiting Program Officer to work on copyright policy. He joined the Creative Commons Copyright Advocacy Group, representing CARL and Queen's University.
- CARL established a listserv for copyright specialists from member institutions and Executive Directors of the regional consortia.
- CARL submitted a response to the Consultation on Options for Reform of the Copyright Board of Canada. The submission was prepared by Mark Swartz and Howard Knopf.
- A Half-Day on the Hill event was included in the 2017 CARL Fall General Meeting in Ottawa. David Lametti, Parliamentary Secretary to Industry, Science and Economic Development Minister Navdeep Bains, provided a speech to launch the event, then teams of CARL members fanned out to meet with MPs and policy makers, where they presented CARL's views on fair dealing and other policy areas important to CARL.
- The CARL Board decided that CARL should apply for intervenor status in the appeal of the *Access Copyright v. York* decision.
- In November, CARL joined a large group of internet experts from around the world who signed a common declaration, "The Washington Principles on Copyright Balance in Trade Agreements."
- In response to the December announcement that responsibility for the 2017 Legislative Review of the *Copyright Act* was officially conferred on the INDU Committee, CARL assembled a working group of six copyright specialists led by Mark Swartz to prepare for the review.
- The Policy Committee struck a working group, chaired by Pascal Calarco, to develop and re-launch *fair-dealing.ca* during Fair Dealing Week (February 16 – March 2, 2018). The group also started planning a social media (Twitter) campaign as part of CARL's fair dealing advocacy, using the Social Media Strategy and Calendar provided by Temple Scott Associates (TSA) as a starting point.
- Martha Whitehead and Susan Haigh joined the Canadian Federation of Library Associations (CFLA) Copyright Committee, chaired by Victoria



*Jonathan Bengtson and David Lametti at the 2017 CARL Fall Meeting*

Owen from University of Toronto Scarborough, who also sits on CARL's Policy Committee.

- Throughout 2017 CARL staff met regularly with a broader group of stakeholders in PSE sector copyright, including Universities Canada, Colleges and Institutes Canada (CICan), Canadian Association of University Teachers (CAUT), Canadian Federation of Students (CFS), and Canadian Alliance of Student Associations (CASA).

## Strengthening Capacity

Under the leadership of Vivian Lewis, the Strengthening Capacity Committee worked towards the long-term support of librarian research, workforce development and renewal, strategic recruitment, leadership and management development, and diversity. 2017 initiatives included:

- A successful Librarians' Research Institute (LRI) was held at Western University from June 12–15. The LRI is an intensive four-day workshop for practicing Canadian academic librarians on scholarly research, inquiry, and publishing. Registration was at full complement with 30 participants from 16 different CARL members' institutions, plus one non-CARL institution. In the post-LRI survey 98% of participants stated the quality of the content, discussions and one on one peer mentor meetings were good to very good and would recommend the LRI to colleagues.
- A business plan for a long-term, self-sustaining LRI was drafted and a working group was struck to develop an evaluation framework.
- A multi-year call for host institutions was also circulated in 2017 and Concordia University, University of New Brunswick, and University of Toronto were selected to host the 2018, 2019, and 2020 editions, respectively. Planning commenced for the 2018 LRI, the first bilingual edition.
- The Core Competencies Working Group continued to work on refreshing the *Core Competencies for 21st Century CARL Librarians*, to replace the 2010 publication. An environmental scan of other relevant competency statements was completed and focus groups with library practitioners were held at the Research in Academic Libraries (ReAL) conference in British Columbia and the Ontario Library Association Super Conference.
- A session on Strengthening Indigenous Representation and Reconciliation was held at the 2017 CARL Fall General Meeting, polling Directors on what is currently being done at the institutional level, and how CARL could add value. Next steps will be considered in 2018.



- Members of the Strengthening Capacity Committee and CARL staff met with ARL colleagues in December to discuss opportunities to engage with the ARL Academy and leadership program. Input was solicited from Canadian AULs about their interests in engaging with CARL.
- The CARL Research in Librarianship Grant is awarded annually to librarians working in research libraries and graduate students currently enrolled in library and information studies programs, who are actively conducting structured, evidence-based research pertaining to research and/or academic libraries with the intent to promote research in the field of academic librarianship by and/or about Canadians. Winners of the Practicing Librarian Category were:
  - **Diane Dawson, Jaclyn McLean, and Charlene Sorenson** (University of Saskatchewan), 'Communicating Cancellations to Campus: Strategies Across Canada.'
  - **Lauren Byl** (University of Waterloo), 'Author Addendum Conundrum: Reconciling Author Use of Addenda Against Publisher Acceptance.'
  - **Heather Dean** (University of Victoria), 'Finding Finding Aids: A Study of Legacy Metadata in Special Collections and University Archives at Canadian Research Libraries.'
  - **Sajni Lacey and Susie Wilson** (University of British Columbia), 'Curriculum Mapping as a Tool to Grow Library-Faculty Partnerships: A Case Study.'

Winners of the Graduate Student Category were:

- **Madeline Donnelly** (MLIS student, Western University), 'Peer Review and the Scholarly Conversation: Shifting Towards a Culture of Transparency.'
- **Claire Burrows** (PhD Candidate, Library and Information Science, Western University), 'Examining How Canadian Academic Libraries Are Currently Approaching Issues Related to Accessibility for Students with Disabilities and How They Are Being Met.'

## Advancing Research



Under the leadership of chair Joy Kirchner, the Advancing Research Committee (ARC) began its second year of existence by releasing a Scholarly Communications Roadmap, which effectively became a guide – and measuring stick – for its open scholarship activities.



- The CARL Scholarly Communications Roadmap was developed by a working group led by Kathleen Shearer, and published in January 2017. The Roadmap presents clear activities it aims to undertake to stimulate positive change towards an open, sustainable, effective and innovative scholarly communication system. Several international presentations by CARL members have focused on this Roadmap, and responses to it are consistently enthusiastic.
- CARL signed on to the Jussieu Call for Open Science and Bibliodiversity, which stresses the importance of developing alternative models in addition to article processing charges (APCs) in order to achieve open science.
- Chaired by Jonathan Bengtson, ARC's Digital Preservation Working Group began assessing the capacity and content coverage of key digital repositories in Canada, planning a summit to be held in November 2018, and strengthening the web archiving community of practice. Phase one of the Digital Preservation Working Group readiness survey (CARL institutions) closed on November 17th. The second phase will seek responses from other academic institutions, archives, museums and galleries, national libraries, and large public libraries.
- In February, a summary report of the November 2016 *Where Next for Repositories?* Forum was published. Late in 2017, ARC announced and invited expressions of interest for a new working group, the Open Repositories Working Group, which will follow up on the recommendations identified in this forum and work to strengthen and unify Canadian repositories in their shared goals.
- In April 2017, CARL issued a new one-page guide on "How to Assess a Journal", developed by Lise Brin, Christie Hurrell, Jessica Lange, Dominique Lapierre, and Elizabeth Yates.
- Starting in mid-2016, CARL convened the Canadian Scholarly Communication Working Group (CSPWG), a group of stakeholders in sustainable scholarly publishing in Canada chaired by Gwen Bird. The group's final report was released in both French and English in July of 2017. Subsequently, a meeting was held on July 10 at the University of Ottawa to advance discussions on one of the key projects identified by the CSPWG, Érudit/PKP's proposed national journal platform Coalition-Publi.ca. The meeting was attended by representatives from PKP, Érudit, CRKN, and CARL.
- Over the summer, the CARL office and Kathleen Shearer started working on a white paper on library budget strategies related to journal licensing, with valuable input from CRKN, to be released in 2018.
- Led by COPPUL Digital Preservation Network Coordinator Corey Davis, a Canadian Web Archiving Coalition (CWAC) was formed, an initiative of the CARL Digital Preservation Working Group. The aim of CWAC is



to engage Canadian organizations that are undertaking or interested in web archiving. Its inaugural meeting was held in conjunction with the International Internet Preservation Consortium (IIPC) in Ottawa on September 20. CWAC also issued a survey to gather information on activities, plans, challenges, and technical approaches related to web archiving in Canada. Early results were discussed at this meeting.

- CARL and COAR co-hosted a webinar on October 3, with Kenning Arlitsch and Paul Needham, who discussed their respective projects' (RAMP and IRUS-UK) approaches to standardizing institutional repository statistics. 31 individuals/sites attended and a national IRUS and/or RAMP pilot has been proposed and will be considered by ARC.
- For Open Access Week (October 20-24), several CARL Board members and members of ARC participated in a Twitter series whereby each voiced (via a visual treatment developed by Lise Brin) one way in which Open Access is "open in order to..." – the agreed-upon international theme of this year's Open Access Week.
- ARC chair Joy Kirchner led a session during the CARL Fall General Meeting about the SPARC Open Education Leadership Program and plans to develop a CARL OER initiative that would build on SPARC's offering.
- The *@Risk North (Collections en péril)* forum, held November 10 at LAC in Ottawa, allowed academic libraries to engage in a strategic discussion around the state of shared print preservation programs in Canada and beyond, from a variety of perspectives, and to begin identifying next steps in national or regional coordination. The forum was jointly sponsored by CARL, CRL, LAC, and U of T Libraries, and attracted approximately 100 participants from 50 organizations.
- CARL sponsored Jean-Sébastien Sauvé, an MLIS student from the Université de Montréal to attend OpenCon 2017 in Berlin, Germany. Sauvé wrote an engaging account of his experience which was featured on the CARL website.
- A new working group focused on adding Canadian journal content to the SHERPA/RoMEO database was formalized and aims to add information about as many Canadian journals as possible, starting with Canadian Association of Learned Journals (CALJ) – by spring 2018.



*@Risk North Keynote  
Speaker, Constance Malpas,  
Research Scientist, OCLC.*

## Measuring Impact

Under the leadership of Colleen Cook, CARL continued to support assessment within and across Canadian research libraries by collecting and publishing data that demonstrates the valuable contributions of these libraries toward higher education and the research enterprise, and by facilitating the continued evolution of library services. Our 2017 initiatives included the following:

- The data collection for the Statistical Survey of Canadian Academic and Research Libraries 2015-2016 was completed in the spring of 2017, and results were published in the fall along with an accompanying highlights document. Reporting for the 2016-2017 statistics opened in early October and was completed in December.
- The CARL Statistics Working Group released a survey to CARL directors in mid-September 2017 to solicit feedback on the experiences of their institutions in completing CARL's annual statistics survey. 28 out of 31 CARL members institutions provided feedback which will inform recommended revisions to the CARL Statistical Survey.
- In October, the University of Victoria Libraries hosted the 2017 Canadian Library Assessment Workshop (CLAW), a CARL biennial event. A limited-registration, full-day workshop on mixed-methods assessment with Colleen Cook (Dean of Libraries, McGill University) was also held in conjunction with CLAW on October 25th. CLAW presentation topics ranged widely in subject matter, including data visualization, coding qualitative data, assessing e-resource statistics, services assessment, and more. In total, 74 participants attended CLAW, representing 37 institutions from coast to coast.
- The CARL Assessment Committee's Continuing Education Working Group formed the Data Visualization Project Group, a task-oriented project group to create online guidance and educational tools aimed at informing senior library administrators about developing and using dashboards for evaluating and communicating value in libraries. The group held their first meeting in December 2017 and have been given a one-year mandate to complete their toolkit.



# Member Gatherings

## CARL Meetings

The 2017 CARL Spring Meeting, convened May 16-18 in Hamilton, Ontario, and featured CARL committee lightning consultations, a joint CARL-CULC Dinner, and presentations on 'Advancing the Ottawa Declaration through cross-sectoral collaboration', 'Opportunities with Linked Open Data', 'International Collaboration Opportunities'.

The 2017 CARL Fall Meeting convened November 7-9, in Ottawa, and included sessions on LCDRI and Research Data / Portage, Copyright and Advocacy, Strengthening Indigenous representation and reconciliation, and 'Coalition-publi.ca' / SPARC Open Education Leadership Program. Members also participated in meetings on Parliament Hill, after a keynote speech by David Lametti.



*CARL members and staff at the 2017 Fall General Meeting in Ottawa.*



## CARL Distinguished Service to Research Librarianship Award



*Guy Berthiaume, Donna Bourne-Tyson, Martha Whitehead, and representatives from ProQuest.*

CARL honored Guy Berthiaume, Librarian and Archivist of Canada, with its Award for Distinguished Service to Research Librarianship on May 17, 2017, in Hamilton Ontario. This award is conferred annually to an individual at a CARL member institution who has made a substantial local, national, or international contribution to research librarianship.

Berthiaume has been with Library and Archives Canada since June 2014, and in a brief three years has had a remarkable, positive impact on the profile, collections, services and staff of Canada's national library and archives. He also set a priority to increase LAC's work with memory institutions across Canada by establishing a Stakeholders Forum, and by advancing dialogue on collaboration among galleries, libraries, archives and museums.

## CARL Award of Merit

CARL presented Mr. Brent Roe with the CARL Award of Merit during its fall membership meeting on November 8, 2017, in Ottawa, Ontario. This award recognizes outstanding contributions to Canadian research librarianship by individuals who are not employed by CARL member libraries. Mr. Roe joins seven previous recipients of this award, which was introduced in 2001.

Mr. Roe received the Award of Merit for his leadership and vision during his work as Executive Director of CARL from 2008 to 2014. During that time, he organized CARL's advocacy activity in the lead up to the adoption of the Copyright Modernization Act of 2012. He also supported the work of CARL in the promotion of open access to the results of publicly funded research and the preservation and sharing of research data.



*Donna Bourne-Tyson, Brent Roe, and Thomas Hickerson.*

## Portage Annual Update

Portage experienced significant growth and maturation in 2017, advancing key objectives and developing new and existing relationships, as outlined in their 2017-18 Business Plan.

The Portage Secretariat grew from the addition of a 0.5 FTE Project Officer and a full-time Service Manager, and welcomed a new Director in the fall.

Portage's governance structure saw significant change with the formation of the CARL Directors Portage Steering Committee and the Portage Advisory Committee.

Relationships with influential stakeholders in Canadian research landscape were strengthened through collaboration with Tri-Agency member institutions in several initiatives, and contributing to the Leadership Council for Digital Research Infrastructure (LCDRI) reports to Innovation, Science and Economic Development Canada. Links were formed through the development of MOUs with regional library councils.



*Council of Chairs and Portage Secretariat*

The Federated Research Data Repository (FRDR), guided by its Steering Committee composed of members from CARL-Portage and Compute Canada, continued its development, transitioning from alpha through beta testing, and into limited production mode.



*RDM in Canada Event in Toronto*

The Portage Director traveled extensively across Canada, presenting to individual institutions and to regional consortia on RDM and Portage. He also met frequently with policy and funding bodies, and other stakeholders and organizations supporting research data in Canada. Portage training and outreach activities also expanded to include “RDM in Canada” events that bring together various stakeholders to learn about Portage and discuss emerging RDM topics of national importance.

Supporting the work of existing Portage Expert Groups, various standalone and subsidiary Working Groups were formed:

**Data Discovery Expert Group:**

1. Metadata Working Group
2. Collections Development Working Group

**Training Expert Group**

3. RDM 101 Working Group
4. DMP Expert Group
5. Dataverse North Working Group
6. Institutional RDM Strategies Working Group
7. Responsible RDM Practices for Sensitive Data Working Group

In step with this expansion of working groups, the Portage network grew from 42 volunteers at the end of 2016, to over 110 volunteers from nearly 40 research institutions from across Canada.



*Portage Network of Expertise at RDM in Canada Event in Montreal*

## Key 2017 Portage

### Achievements:

- LCDRI DM group hold first meeting in Ottawa.
- A successful capstone event completed Portage's engagement with a group of researchers in the SSHRC DMP Workshop on January 24, 2017.
- The Portage Training Expert Group published a White Paper on RDM Training in Canada.
- The contract with CIHR for the development of six RDM Training Modules was completed in March 2017.
- Portage published its business plan for 2017-18.
- The Portage Training Expert Group formed two working groups to develop online introductory training modules on RDM and data management plans.
- The Dataverse North Working Group was formed to develop a community of practice centered around the use of the Dataverse repository platform on Canadian campuses.
- The Portage Advisory Committee met for the first time under its new mandate.
- CARL-Portage signs MOU with OCUL and CAUL-CBUA to advance RDM and digital preservation.
- Compute Canada and CARL-Portage announce the start of the beta testing stage in FRDR development.
- Portage Council of Chairs held second annual meeting in Ottawa.
- Lee Wilson seconded as Portage Service Manager.
- FRDR Service Model Working Group formed to formulate service development strategy for FRDR.
- LCDRI DM report submitted to ISED
- Data Discovery Expert Group release final reports on collections development for FRDR and metadata standards for research data discovery.
- Jeff Moon is appointed as Portage Director.
- Training Expert Group releases online training resource library and training request form.
- Portage hosts RDM in Canada event, colocated with RDA 10th plenary meeting in Montreal, QC.
- FRDR enters limited production stage of development.
- Portage Secretariat held stakeholder tour in Ottawa to discuss topics of mutual interest and collaboration with representatives from the Tri-Agency.
- Environment and Climate Change Canada, ISED, and the Canadian Association for Graduate Studies.
- The Institutional RDM Strategies Working Group was formed to prepare supporting materials to help institutions develop institutional strategies on their campuses.
- The Responsible RDM Practices for Sensitive Data Working Group was formed, with their first meeting scheduled in 2018.



# 2017 CARL Publications

## Regular Publications



[Access the archive](#) of the CARL E-lert weekly bulletin

## Responses to National Issues and Position Statements

- CARL Statement in support of Fair Use/Fair Dealing Week 2017 [View PDF](#)
- Response to Global Affairs Canada Consultations on North American Free Trade Agreement Renegotiation and Modernization [View PDF](#)
- CARL Statement on Bill C-58: An Act to Amend the Access to Information Act and the Privacy Act [View PDF](#)
- CARL Submission to the Consultation on Options for Reform of the Copyright Board of Canada [View PDF](#)
- CARL Opening Statement to ETHI on The Right to be Forgotten [View PDF](#)

## Reports and Publications

- CARL Scholarly Communications Roadmap [View PDF](#)
- Summary Report: Where Next for Repositories? An open national forum sponsored by CARL in association with COAR [View PDF](#)
- How to Assess a Journal: A.K.A. How not to publish in an undesirable journal [View PDF](#)
- Canadian Scholarly Publishing Working Group Final Report [View PDF](#)
- Fair Dealing Myths and Facts [View PDF](#)

Recent CARL publications and documents are available at:

<http://carl-abrc.ca/publications-and-documents/>

Portage's publications and documents are available at:

<https://portagenetwork.ca/about/documents-and-presentations>

## CARL Events in 2017

- **2017 CARL Spring General Meeting** (May 16-18 – Hamilton, Ontario)
- **2017 Librarians' Research Institute** (June 12-15 – London, Ontario)
- **Canadian Web Archiving Coalition (CWAC) inaugural meeting** (September 20 – Gatineau, Quebec)
- **2017 Canadian Library Assessment Workshop** (October 26-27 – Victoria, British Columbia)
- **2017 CARL Fall General Meeting** (November 7-9 – Ottawa, Ontario)
- **@Risk North**, co-presented by CARL, Library and Archives Canada, the University of Toronto, and the Center for Research Libraries (November 10 – Ottawa, Ontario)

## Communications

- CARL continued to publish its weekly E-lert news bulletin. The number of subscribers increased from 404 to 512 in 2017.
- CARL also increased its reach via Twitter, growing from 1221 to 1751 followers in 2017.
- The [CARL](#) and [Portage](#) websites were expanded substantially.

## Operations

In order to better support the Portage initiative and the range of CARL projects, there were a number of changes to the CARL team in 2017.

- Jeffrey Moon became Portage Director on September 15<sup>th</sup>, following the retirement of Chuck Humphrey.
- Katherine McColgan began an 80% secondment with CFLA on August 8<sup>th</sup>.
- Veronica Amirault assumed an increased administrative role.
- Julie Morin and Shahira Khair accepted ongoing full-time positions as Project Officers.
- Lee Wilson, Research Consultant at ACENET, was seconded to the position of Portage Service Manager, beginning July 1<sup>st</sup>.
- Mark Swartz from Queen's was named CARL's first Visiting Program Officer in the areas of copyright and other policy issues.

# Looking ahead to 2018

CARL anticipates an exciting and full slate of activities this coming year.

Guided by the Scholarly Communication Roadmap, ARC will continue to focus its efforts on reshaping scholarly publishing practices towards increased sustainability and openness. In line with this goal, CARL will develop strategies related to library budgets in response to escalating journal prices. ARC's Digital Preservation Working Group will complete phase two of its readiness survey and will host a one-day national forum devoted to digital preservation. The Open Repositories Working Group will launch a slate of projects that follow up on the recommendations identified in the *Where Next for Repositories?* Forum.

Advocacy work will increase in 2018, to support CARL's likely participation in the Parliamentary Review of the Copyright Act, and its commitment to asserting the benefits of fair dealing within the realm of post-secondary education. CARL will also advocate for additional changes to the *Act* that would benefit libraries, educational institutions, and individuals.

We look forward to a spring meeting in Regina, Saskatchewan, followed by the CFLA National Forum that same week. In conjunction with our Fall general meeting in Montreal, Quebec, the Advancing Research Committee's Digital Preservation Working Group is planning a full-day session on gaps and opportunities for digital preservation in Canada.

LRI 2018 will take place at Concordia University in Montreal, Quebec, in June, and the Core Competencies Working Group is expected to finish drafting the newly revised *Core Competencies for 21st Century CARL librarians*. Next steps suggested during the session on Strengthening Indigenous Representation and Reconciliation, including organizing a full-day session on this topic, will be considered in 2018.

Finally, the data collection for the CARL Statistical Survey 2016-2017 will be published in 2018, and member feedback will be incorporated into a report on recommended revisions to the CARL Statistical Survey. We also anticipate the Data Visualization Project Group's tool kit to be completed in 2018.

# CARL institutions

## University Libraries

Brock University  
Carleton University  
Concordia University  
Dalhousie University  
McGill University  
McMaster University  
Memorial University  
Queen's University  
Ryerson University  
Simon Fraser University  
Université de Montréal  
Université de Sherbrooke  
Université du Québec à Montréal  
Université Laval  
University of Alberta  
University of British Columbia  
University of Calgary  
University of Guelph  
University of Manitoba  
University of New Brunswick  
University of Ottawa  
University of Regina  
University of Saskatchewan  
University of Toronto  
University of Victoria  
University of Waterloo  
University of Windsor  
Western University  
York University

## Federal Institutions\*

Library and Archives Canada  
National Research Council Canada,  
National Science Library

### CARL MEMBER STATISTICS 2016 - 2017



\* These members do not take part in CARL's political advocacy activities.



## CARL Staff



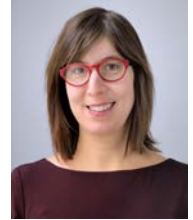
Susan Haigh,  
Executive Director



Katherine McColgan,  
Manager, Administration  
and Programs



Jeffrey Moon,  
Portage Director



Lise Brin,  
Program Officer



Shahira Khair,  
Project Officer



Julie Morin,  
Project Officer



Lee Wilson,  
Service Manager,  
Portage



Veronica Amirault,  
Administrative  
Assistant



Kathleen Shearer,  
Research Associate



Mark Swartz,  
Visiting Program  
Officer