



2018 ANNUAL REPORT

Canadian Association of Research Libraries Annual Report 2018

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President's Message

I am pleased to present the 2018 CARL Annual Report.

CARL is the voice for Canada's research libraries and provides leadership on behalf of Canada's research libraries. Its initiatives are transformative and span the research library landscape in our collective effort to enhance research and higher education as well as to enable broad access to scholarly information.



In 2018, we made significant progress in all four of our strategic directions – Advancing Research, Strengthening Capacity, Measuring Impact and Influencing Policy – a credit to the efforts and commitment of our members, committee chairs, board and staff, and stakeholders. It is thanks to their energy and enthusiasm that 2019 promises to be yet another eventful year as we look forward to our new Strategic Framework for 2019-2022.

Donna Bourne-Tyson, CARL President

Executive Director's Message



2018 was another busy year for CARL as we concluded our 2016-2019 Strategic Directions. It was also a year of significant growth as our range of initiatives continued to grow and mature. I look forward to the new challenges that our Strategic Framework for 2019-2022 will bring.

As it has always done, CARL acted as the voice of Canada's research libraries in national policy areas that implicate libraries such as the Parliamentary review of the *Copyright Act*. We will continue to advance scholarly communication and develop new methods of demonstrating the value of libraries in addition to building research data management capacity through the work of Portage.

It has been a privilege to continue to work closely with library leaders throughout Canada, and I would like to thank our Board of Directors, our 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 (to May 2018)
McMaster University
Larry Alford (from May 2018)
University of Toronto

Director, Western Region Representative

Gwen Bird (to May 2018)
Simon Fraser University
Melissa Just (from May 2018)
University of Saskatchewan

Executive Director

Susan Haigh



Strategic Committee Chairs

Advancing Research Committee
Joy Kirchner (York University)/
Catherine Steeves (Western University)

Assessment Committee
Colleen Cook (McGill University)

Policy Committee
Martha Whitehead (Queen's University)

Strengthening Capacity Committee
Vivian Lewis (McMaster University)

Highlights from 2018

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

In 2018, with guidance from the Policy Committee under the leadership of Martha Whitehead, CARL participated in the following advocacy initiatives:

- Review of the *Copyright Act* - Susan Haigh and Mark Swartz appeared as witnesses on behalf of CARL at a hearing on Parliament Hill on April 24th, as part of the Standing Committee on Industry, Science and Technology (INDU)'s review of the *Copyright Act*. Mark Swartz led the preparation of CARL's brief, which was submitted to the INDU Committee on July 6th. Lise Brin led the production of a memorandum, *A Guide to Canadian Research Libraries' Spending on Content* while Mark Swartz led the production of an additional memorandum, *Fair Dealing/Use: How Canada Fits Internationally*. Mark Swartz and Jeff Moon prepared a brief from CARL-Portage focused on Text and Data Mining. A variety of Hill meetings were also held. Overall, research libraries and the library community as a whole, together with a range of others, provided strong and articulate voices for user rights and the public interest. The INDU report will be published in mid-2019.
- On April 27th, Susan Haigh and Howard Knopf participated on behalf of CARL in an invitational consultation with ministerial and departmental officials from both Heritage Canada and Innovation, Science and Economic Development on the subject of tariff regime harmonization in the context of Copyright Board Reform. CARL added its voice to those of Universities Canada, Michael Geist, Ariel Katz and others in trying to dissuade the government from tabling legislation that would effectively make tariffs mandatory for literary works. This part of the draft legislation was subsequently put on hold.
- On January 19th, CARL issued a statement expressing support for net neutrality, an important component of ensuring equitable access to online information and services for all Canadians
- CARL released a statement on April 6th in opposition to Bell Coalition's Proposal to Disable Online Access to Piracy Sites, explaining that it conflicted with several of the values and principles upheld by CARL members, including net neutrality, fair dealing, freedom of expression, and equitable access to online information and services. The Canadian

Radio-television and Telecommunications Commission (CRTC) later rejected the proposal.

- CARL issued a statement on the United States-Mexico-Canada Agreement (USMCA) expressing concern that the new agreement extends the term of copyright from 50 years to 70 years after the artist or creator's death.
- On March 1st, Martha Whitehead, Mark Swartz, Joshua Matthewman (Temple Scott Associates) and Susan Haigh had meetings on the Hill with MP's, including Brian Masse (Member of Parliament [NDP] for Windsor West and Vice-Chair of the INDU Committee); Dan Ruimy (Member of Parliament [Liberal] for Pitt Meadows – Maple Ridge and Chair of the INDU Committee); Peter Van Loan (Member of Parliament [Conservative] for York – Simcoe and Vice-Chair of the Canadian Heritage Committee); and Pierre Nantel (Member of Parliament [NDP] for Longueuil – Saint Hubert and Vice-Chair of the Canadian Heritage Committee.) On June 11th, Susan Haigh, Mark Swartz and Josh Matthewman attended meetings with Maxime Dea (Policy Advisor, Office of the Prime Minister) and with Faizel Gulamhussein (Senior Policy Advisor, Office of the Minister of Canadian Heritage).
- On June 2nd, Susan Haigh, Lise Brin, and Mark Swartz presented “The Ups and Downs of Representing the Educational Perspective During the Current Copyright Act Review” where they discussed CARL's recent fair dealing and copyright advocacy efforts at the ABC Copyright Conference in Vancouver.
- CARL's leave to intervene motion in the York-Access Copyright appeal, which entailed a 30-page affidavit signed by Victoria Owen (University of Toronto) and an accompanying legal memorandum, was served and filed on March 9th. On April 20th, CARL received word that its application had been denied by the Federal Court of Appeal. CARL submitted a motion to Reconsideration, and subsequently received word on June 25th that this motion had also been denied. Nevertheless, the motion of Universities Canada and the joint motion by the Canadian Association of University Teachers (CAUT) and the Canadian Federation of Students (CFS) were allowed.
- On July 31st, CARL sent a letter of welcome to the new Canadian Heritage Minister Pablo Rodriguez, in which CARL also expressed support to the proposed National Heritage Digital Strategy funding of \$30M over 5 years.
- On October 2nd, CARL sent a subsequent letter to Canadian Heritage Minister Pablo Rodriguez regarding the decision of the Honourable Michael D. Manson in the case of Heffel Gallery Limited v. The Attorney General of Canada (2018 FC 605), arguing that future enrichment of library special collections and archives in Canada has been imperiled and expressing our support for the Government of Canada's appeal of the decision.

- On October 26th, Susan Haigh, Martha Whitehead and Mark Swartz attended meetings with Celine V. Caira (Policy Advisor, Office of the Minister of Innovation, Science and Economic Development), David Yurdiga (member of the Standing Committee on Canadian Heritage, which was charged with studying remuneration models for artists), and Michael Chong (member of the INDU Committee and Shadow Minister for Infrastructure, Communities and Urban Affairs).
- On November 21st, Susan Haigh and Don Moors, Temple Scott Associates, met with Andy Fillmore, (Parliamentary Secretary to the Minister of Canadian Heritage and Multiculturalism) regarding the Standing Committee on Canadian Heritage's study of remuneration models for artists.
- On December 14th CFLA and CARL jointly submitted a brief to the Standing Committee on Canadian Heritage for their Study on Remuneration Models for Artists and Creative Industries. The brief discusses the context and perspective of Canada's research and academic libraries and large public libraries.
- For Fair Dealing Week 2018 (February 26-March 2) CARL took to social media and relaunched an expanded and bilingual <http://fair-dealing.ca> website to promote the benefits of copyright's fair dealing exception. The working group that led this effort was chaired by Pascal Calarco and included Lise Brin, Josh Dickison, Sarah O'Byrne, Thomas Rouleau, Stephanie Savage, Graeme Slaght, and Amanda Wakaruk.
- Throughout 2018, Susan Haigh, Lise Brin and Mark Swartz regularly met with a group of stakeholders in the post-secondary education sector interested in copyright. Susan Haigh and Mark Swartz also participated in the CFLA Copyright Committee.

Strengthening Capacity

Under the leadership of Vivian Lewis, the Strengthening Capacity Committee (SCC) worked towards the long-term support of librarian research, workforce development and renewal, strategic recruitment, leadership and management development, and diversity. 2018 initiatives included:

- The Librarians' Research Institute (LRI) is an intensive four-day workshop for practicing Canadian academic librarians on scholarly research, inquiry, and publishing. The first bilingual edition of the LRI was held at Concordia University June 18-21. 25 participants from 17 different CARL members' institutions, plus one non-CARL institution, attended. In the post-LRI survey, all respondents said they would recommend future iterations of the LRI to their colleagues.



- The next LRI will be hosted by the University of New Brunswick in Fredericton, in June 2020. Going forward, CARL plans to offer the LRI biennially, in alternating years with the Canadian Library Assessment Workshop.
- A business plan for a long-term self-sustaining LRI, including an evaluation framework, was approved.
- The Core Competencies Working Group (CCWG) continued to work on refreshing the *Core Competencies for 21st Century CARL Librarians*, to replace the 2010 publication. As part of an extensive consultation process the CCWG conducted two in-person focus groups at the 2017 Research in Academic Libraries conference in Vancouver and the 2018 Ontario Library Association Super Conference in Toronto, and four virtual focus groups organized by region (summer 2018). CCWG also circulated a survey open to academic librarians at all levels and human resources professionals and consulted with a number of iSchool deans.
- A session on equity, diversity, and inclusion (EDI) was held at the 2018 CARL Fall General Meeting, featuring guest speaker Mark Puente, Director of Diversity and Leadership Programs, Association of Research Libraries. Afterwards, CARL Directors discussed forming CARL working groups on EDI and Indigenous matters, and creating two matching CARL Visiting Program Officer positions.
- A task group made up of SCC members formed to discuss the creation of professional development opportunities for senior library leaders, based on feedback received from the Canadian AUL group during a focus group held on September 24th.
- 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:
 - **Beth Maddigan** (Memorial University of Newfoundland), *Libraries as Public 'Homespaces': Exploring Multiple Literacies through Community Pop-Up Art Hives*.
 - **Graeme Campbell** (Queen's University), **Michelle Lake** (Concordia University), **Catherine McGoveran** (University of Ottawa), *Post-depository: Investigating the Persistence of Federal Government Publications in Former Depository Libraries*.

The winner of the Graduate Student Category was:

- **Nicole Doro** (MLIS student, Western University), *Attitudes and Perspectives on the Institutional Repository at the University of Western Ontario*.

Advancing Research

Under the leadership of outgoing chair Joy Kirchner (until May 2018), and new chair Catherine Steeves, the Advancing Research Committee (ARC) continued to further the goals set out in CARL's Scholarly Communication Roadmap while also engaging in collective efforts with Canadian research libraries to sustain print and digital collections:

- CARL released *Responding to Unsustainable Journal Costs: A CARL Brief* on February 15th. Authored by CARL Research Associate Kathleen Shearer with input from the Canadian Research Knowledge Network (CRKN), the brief addresses the increasingly alarming situation of escalating subscription costs for international journals and proposes recommendations for action.
- Having identified the need for more collective action toward greater transparency of licensing information among member institutions in the CARL Roadmap, CARL Member institutions jointly released their 2016-17 expenditure data for journal and database subscriptions licensed through the Canadian Research Knowledge Network consortium. The data was made public via the Federated Research Data Repository (FRDR), managed jointly by Portage and Compute Canada.
- CARL became a member of the Global Sustainability Coalition for Open Science Services (SCOSS). Susan Haigh now represents CARL on the SCOSS Board; Lise Brin is a member of the advisory committee that reviews the funding applications. CRKN then became a partner in this initiative, so that Canadian pledges can be managed as a Canadian consortial endeavour.
- CARL joined thousands of other organizations and individuals in signing on to the San Francisco Declaration on Research Assessment (DORA), which recommends changes in practices by the research community regarding the use of research metrics.
- ARC launched the new Open Repositories Working Group (ORWG) in January 2018, co-chaired by Martha Whitehead and Geoff Harder (University of Alberta), and with representation from librarians responsible for repositories at universities across Canada as well as at NRC and LAC. On January 9th, CARL launched an important collaboration with OpenAIRE, the European Commission funded services that support open access and open science in Europe, to make Canadian repositories content findable and searchable through the OpenAIRE platform. In April, the ORWG offered a very successful Webinar on Next Generation Repositories (NGR) in collaboration with the Confederation of Open Access Repositories (COAR), which was attended by 51 people. The ORWG held two community calls in May, one in each official language, to establish initial contact with the wider Canadian repository community and identify the community's preferred strategies for information-sharing and input gathering. In addition to

these activities, the ORWG is also developing guidance on standards for institutional repository usage and data.

- In February, CARL released a summary report from its November 2017 forum on shared collections, *@Risk North: Collections en péril*. The report includes an overview of the presentations as well as the discussion outcomes from this event. ARC's Digital Preservation Working Group (DPWG), under the leadership of Jonathan Bengtson, spent 2018 planning a follow-up event specific to digital preservation, *@Risk North 2: Digital Collections*, which took place November 9, 2018. The event brought together 20 speakers and 110 attendees from memory institutions across the country. Clifford Lynch, Executive Director of the Coalition for Networked Information (CNI), delivered an engaging keynote address around evolving challenges related to digital preservation. The planning committee for *@Risk North 2* included Sylvain Bélanger, Jonathan Bengtson, Lise Brin, Corey Davis, Susan Haigh, Geoff Harder and Lara Wilson.
- The DPWG undertook the second phase of its survey on digital preservation capacity within Canadian memory institutions. Following up on phase 1 which captured data from CARL member institutions, phase 2 collected responses from other academic libraries, museums, galleries, and community organizations. Findings were reported by Grant Hurley (Scholars Portal), the lead on the survey project.
- In March, the Canadian Web Archiving Coalition (CWAC), a multi-stakeholder group initiated in 2017 by the Digital Preservation Working Group thanks to the leadership of COPPUL's Corey Davis, formed its first Coordinating Committee. Interest groups devoted to Collections, Advocacy, and Training were formed later in 2018 to address the issues identified by CWAC as priority topics.
- On August 22, Joy Kirchner and Lise Brin hosted a full-day working meeting at York University where they brought together nine librarian leaders in OER from across Canada, as well as Nicole Allen representing SPARC. The objective for the day was to identify opportunities for strengthening the network of librarians involved in OER across Canada and to identify possible avenues for CARL to support leadership training in this area. Subsequently, Joy Kirchner, Lise Brin, Dianne Cmor (Concordia University), and Ann Ludbrook (Ryerson University) drafted a proposal of CARL activities to support OER, which were approved by the CARL Board at their November meeting. Calls for expressions of interest for a Visiting Program Officer in OER and for an OER Working Group were distributed in December, and work in this area will begin in earnest in 2019.
- As a follow-up to the *@Risk North* forum in 2017, LAC and CARL are sharing responsibility for a newly formed Canadian Collective Print Strategy Working Group, which includes representation from research libraries, existing shared print initiatives, the Toronto Public Library and Bibliothèque et Archives nationales du Québec (BAnQ). Gwen Bird (co-

chair, along with LAC's Monica Fuijkschot) and Susan Haigh are representing CARL. In 2018 the group begun discussions on how best to understand overlaps and opportunities for collaborative endeavor on a national scale.

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 2018 initiatives included the following:

- The data collection for the Statistical Survey of Canadian Academic and Research Libraries 2016-2017 was completed in the spring of 2018, and results were published in the fall along with an accompanying highlights document. Reporting for the 2017-2018 statistics opened in October.
- The Assessment Committee's Continuing Education Working Group conducted a survey to assess the need for training on qualitative methods and qualitative data and to determine which training formats and resources are preferred.
- The Statistics Working Group completed its Report and Recommendations on the Statistical Survey of Canadian Academic and Research Libraries in summer 2018. It will be revised after community feedback.
- CLAW 2019 will be held at the University of Windsor on October 22-24th, 2019. A programming committee has been formed with Ruby Warren (University of Manitoba) and Sharon Murphy (University of Alberta) as co-chairs. Based on the results of the Continuing Education Working Group survey, CLAW will focus on qualitative research methods. It is intended that some of these sessions will be repurposed as CARL webinars.
- The Continuing Education Working Group's Data Visualization Project Group developed a LibGuide aimed at providing senior library administrators and assessment teams with guidance on developing and using dashboards and related data visualization tools for evaluating and communicating value in libraries.



Member Gatherings

CARL Meetings

The 2018 CARL Spring Meeting convened April 29 – May 1 in Regina, Saskatchewan, and included sessions on Portage and Open Scholarship.

The 2018 CARL Fall Meeting convened November 6-8, in Montreal, Quebec, and featured a strategic planning session, a copyright debrief, and presentations on Portage, the CARL statistics program, CARL competencies, and diversity.



CARL members and staff at the 2018 Fall General Meeting in Montreal.

CARL Award for Distinguished Service to Research Librarianship – Leslie Weir



ProQuest representatives Tina Brown & Emmanuel Axais, with Leslie Weir, and CARL President, Donna Bourne-Tyson.

CARL honored Leslie Weir with its Award for Distinguished Service to Research Librarianship on November 7th, in Montreal Quebec. The 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.

Ms. Weir has been widely recognized in a number of contexts for her substantial and lasting impact on Canadian and international librarianship over her more than three decades as a professional librarian. Following her early career at the National Library of Canada and the Statistics Canada Library, she joined the University of Ottawa library as Associate University Librarian prior to serving as University Librarian for three terms. As University Librarian, Weir oversaw the first strategic plan for the library and used that plan to help position the library as a strategic partner within the larger research ecosystem.

CARL Award of Merit - Chuck Humphrey

CARL presented Charles (Chuck) Humphrey with the CARL Award of Merit during its spring membership meeting on April 30th. This award recognizes outstanding contributions to Canadian research librarianship by individuals not employed by CARL member libraries. Mr. Humphrey recently retired from the University of Alberta Libraries. He was honoured for his outstanding work while seconded to CARL as the initial Director of the Portage research data management network from September 2015 until the fall of 2017.



Chuck Humphrey and Martha Whitehead

Portage Annual Update

Portage continues to experience significant growth, both in its Network of Expert, and the aspects of the research data life cycle that it addresses. This included sensitive data, the national discovery layer, and data management planning.

Portage worked with influential stakeholders in the Canadian research landscape including the Tri-Agency funding agencies, Leadership Council for Digital Research Infrastructure (LCDRI), and Research Data Canada. Additional links were formed through the development of MOUs with regional library councils. It also strived to influence RDM policy in Canada through briefs to both INDU and the Tri-Agency.

The Federated Research Data Repository (FRDR) was awarded resources in Compute Canada's Research Platforms and Portals Competition and is now in limited production mode and continues to work towards full production. Toward this end, a privacy consultant was hired to review draft operational policies, privacy policies, and terms of use.



RDM in Canada Event in Toronto

The Portage Director continues to provide training on research data management across Canada. In 2018, this included a cross-country stakeholder tour with the Tri-Agency in January and February as well as a pre-OLA Super Conference Workshop at Ryerson University. Both the Director and the Service Manager also promote Portage nationally and internationally through conferences, workshops, symposiums, and other events. Portage is increasingly recognized internationally for its leadership in research data management

Portage and CARL worked throughout 2018 in collaboration with the Leadership Council on Digital Research Infrastructure (LCDRI), Research Data Canada and others toward a wholistic approach to research data management (DM) in Canada. In 2019, the Portage Director will continue to meet regularly with key stakeholders toward the formation of a new research data management organization.

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

Data Management Planning Expert Group

- Policy Working Group
- Exemplars Working Group

DDEG's FRDR Discovery Service Working Group

- Research Data Repositories Task Force
- Controlled Vocabularies & Subject Headings Task Force
- SHARE Project / Discovery of Related Research Outputs Task Force
- Communications and Outreach Task Force

Working Group on Responsible RDM Practices for Sensitive Data

- Ethics Applications, Data Access Agreements, and Training
- Environmental Scan of Practices for the Management of Indigenous Data

In step with this expansion of working groups, the Portage network grew from 42 volunteers at the end of 2016, to over 100 volunteers from nearly 48 research institutions from across Canada.

Key 2018 Portage

Achievements:

- The Preservation Expert Group published its White Paper: Research Data Preservation in Canada
- The first meeting of the Working Group on Responsible RDM Practices for Sensitive Data was held in January.
- Portage held a day of information sessions at Ryerson University as a pre-OLA Super Conference Workshop. Their development was led by the Training Expert Group.
- FRDR was awarded resources in Compute Canada's Research Platforms and Portals Competition.
- CARL-Portage submitted its response to the ISED-related LCDRI data management report in January.
- An MOU was announced between Portage and BCI on February 22.
- The Institutional RDM Strategy Working Group released its draft template and guidance in March.
- Jeff Moon participated in a cross-country stakeholder tour with the Tri-Agency in January and February (Vancouver, Calgary, Toronto, Halifax).
- An in-person Council of Chairs meeting was held at the University of British Columbia in June.
- The Data Management Planning Group worked with the University of Alberta to develop DMP Assistant 2.0.
- The Research Intelligence Expert Group developed an RDM taxonomy to analyze key RDM documents.
- The Portage RDM 101 training modules were completed in December 2018.
- Portage engaged a privacy consultant to continue development of FRDR policies for full production.
- The Data Discovery Expert Group's FRDR Discovery Service Working Group initiated four 'task forces' to develop a national discovery service.
- Jeff Moon presented a half day workshop at Wilfred Laurier University targeting non-CARL Libraries.
- Sarah Wilkinson joined CARL/Portage as a Project Officer.
- New data repositories were added to the national discovery layer based on the work of the Data Discovery Expert Group.
- A number of large datasets were added to FRDR in the Fall.
- Portage submitted a final response to the Tri-Agency RDM Policy in August.
- Lee Wilson was invited to Brazil to give a talk on Portage and RDM activities in Canada.
- Four proposals submitted with a Portage letter of support received funding under the CANARIE RDM Funding call.
- Portage White Papers are now being preserved in the UBC Open Collections.
- The CIHR RDM Training modules Portage was contracted to develop were published.
- A Training Expert Group working group developed content for a DMP training module.
- Portage submitted a brief to the INDU Committee on Text and Data Mining.

2018 CARL Publications

Regular Publications



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

Responses to National Issues and Position Statements

- CARL Statement on the United States-Mexico-Canada Agreement [View PDF](#)
- CARL brief to the INDU Committee as Part of the Review of the Copyright Act [View PDF](#)
- CARL's Opening Remarks to the Standing Committee on Industry, Science and Trade [View PDF](#)
- Motion for Leave to Intervene in the York University vs. Access Copyright Case - V. Owen affidavit [View PDF](#)
- CARL Statement in Opposition to the Bell Coalition's Proposal to Disable Online Access to Piracy Sites [View PDF](#)
- CARL Statement on Net Neutrality [View PDF](#)
- CARL Response to Budget 2018 [View PDF](#)

Reports and Publications

- A Guide to Canadian Research Libraries' Spending on Content [View PDF](#)
- Fair Dealing/Use: How Canada fits internationally [View PDF](#)
- Responding to Unsustainable Journal Costs: A CARL Brief [View PDF](#)
- Summary Report: @Risk North (Collections en péril) [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 2018

- **2018 CARL Spring General Meeting** (April 29 – May 1, Regina, Saskatchewan)
- **2018 Librarians' Research Institute** (June 18 – 21, Montreal, Quebec)
- **2018 CARL Fall General Meeting** (November 7-8, Montreal, Quebec)
- **@Risk North 2: Digital Collections**, co-presented by CARL, the Canadian Research Knowledge Network, Library and Archives Canada, and Bibliothèque et Archives nationales du Québec (November 9, Montreal, Quebec)

Communications

- CARL continued to publish its weekly E-lert news bulletin. The number of subscribers increased from 512 to 657 in 2018.
- CARL also increased its reach via Twitter, growing from 1751 to 2312 followers in 2018.

Operations

- Sarah Wilkinson was appointed CARL Project Officer starting on September 4th. Taking over from Shahira Khair, her responsibilities include staff support to the Assessment Committee, Statistics Program, and Portage operations.

Looking ahead to 2019

Looking forward, CARL will retain its focus and momentum on a range of key strategic initiatives that impact Canadian research libraries and their user communities.

Continuing along the path set out by the CARL Scholarly Communication Roadmap, the Advancing Research Committee (ARC) hopes to partner with CRKN and others to develop a made-in-Canada approach to sustainable open scholarship. ARC's work around open education will get underway, with the new working group taking on an array of communications, training, and community-building efforts. Dale Askey (University of Alberta) will take over the chairing of the Digital Preservation Working Group, and with its members

will set a new work plan inspired by the results of the digital preservation capacity survey and by recommendations from participants at the *@Risk North 2* forum.

The report of the INDU Committee's review of the *Copyright Act* is expected to be published in May or June 2019. CARL will continue to assert the benefits of fair dealing within the realm of post-secondary education, the importance that tariffs be non-mandatory, and the need to rethink Crown copyright and rights aspects of traditional knowledge and cultural expression.

We look forward to a spring meeting in Victoria, British Columbia, followed by Advancing Open, a CARL-CRKN-SPARC cosponsored event providing an opportunity for the Canadian academic library scholarly communication practitioner community to convene and explore refreshed strategies to foster open scholarship.

The Core Competencies Working Group is expected to finish drafting the newly revised *Core Competencies for 21st Century CARL librarians*. SCC will also oversee the formation of a task group on CARL professional development opportunities for AULs, and two new working groups on EDI and Truth & Reconciliation. The CARL office will also welcome two new Visiting Program Officers for EDI and Indigenous matters.

The CARL Assessment Committee is pursuing the development of an assessment framework that reflects a diversity of impacts and provides tools and resources to assist in a broad range of assessment methodologies. This framework will provide a tool for advocacy and assessment at the local level, strengthening collective impact at the national level, and engaging in international comparison.

Portage, in collaboration with McMaster University Library, will hold a Canadian Data Curation Forum to promote and advance the practice of data curation in Canada. The goal of the forum is to establish a national Community of Practice that will catalyze the development/adoption of data management standards, practices, tools, and skill within and across disciplines and institutions. The Portage Training Expert Group will strengthen its 'Continuum of Training' through primers, training modules, and in-person training through collaborations with other Expert and Working Groups. It also plans to expand into webinars in 2019. Additional Network of Expert projects include metadata best practices and a curation survival guide. Portage-supported infrastructure continues to develop as FRDR progresses towards full production, which includes the finalization of operational policies, privacy policies, and terms of use. Work on the DMP Assistant 2.0 will also resume.

Finally, the data collection for the CARL Statistical Survey 2017-2018 will be published in 2019.

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 2017 - 2018



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

CARL Staff



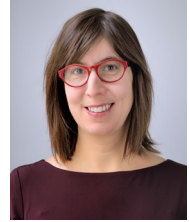
Susan Haigh,
Executive Director



Katherine McColgan,
Manager, Administration
and Programs



Jeffrey Moon,
Portage Director



Lise Brin,
Program Officer



Sarah Wilkinson,
Project Officer



Julie Morin,
Project Officer



Lee Wilson,
Service Manager,
Portage



Veronica Amirault,
Executive
Administrator &
Event Coordinator



Kathleen Shearer,
Research Associate



Mark Swartz,
Visiting Program
Officer