

CARL Executive Director's Report

Tabled at the CARL Board Meeting, May 26, 2025

The following provides an overview of selected activities undertaken or supported by the CARL Office since the January 28, 2025, report to the Board. All past reports are available on the CARL website's [Publications page](#).

Policy and Public Affairs

Federal Government Context

Political unrest continued into 2025 started by a shake up in the Liberal leadership with Justin Trudeau resigning as leader, a quick leadership race that saw Mark Carney, former Bank of Canada Governor, win the leadership of the party by a landslide. A swift move into a federal election saw the Liberal Party take a surprising win over the Conservative Party. Three ridings are currently undergoing a recount.

The dissolution of Parliament resulted in Bill C-63 (Online Harms) and Bill C-27 (Artificial Intelligence and Data) dying on the order paper.

Federal Government Activities

On April 2, 2025, CARL submitted [a brief](#) to the Minister of Finance, François-Philippe Champagne, expressing concerns on Canada's proposed retaliatory tariffs on books, journals, periodicals, textbooks, and other printed materials. We noted that despite the large-scale shift towards digital delivery of content, academic libraries still purchase and lend physical books, with some of our member libraries dedicating upwards of 15%, which could result in millions of dollars in additional costs if the 25% tariff were applied. CARL highlighted this would reduce spending power, cut access to important scholarly materials, impact students' already diminished purchasing power, and likely not have a positive outcome for Canadian creators and publishers since alternative Canadian content could not be procured. The intertwined relationship of the Canadian and US publishing sectors was also noted.

In January, the Department of Canadian Heritage and Mila, a Montreal-based AI research institute, released the results of roundtable discussions that engaged cultural sector representatives and AI experts in exploring non-legislative tools and approaches to key issues AI has raised in the cultural sector. The discussions took place in October 2024 and focused on: transparency measures concerning the use of cultural content; data licensing, particularly in relation to cultural content; and, data curation of open source and public domain cultural data. Details can be found in the [What We Heard Report](#). The roundtable discussions were intended to complement the Department of Canadian Heritage's Survey on the Impacts of Artificial Intelligence in the Cultural Sector. CARL participated in the survey and the results are included in the subsequent Government of Canada's [What We Heard Report](#).

Fair Dealing

CARL hosted a call for Copyright Officers from member institutions to discuss an updated set of Fair Dealing Guidelines put forward by Universities Canada (UC). The new Guidelines are an update to the original 2012 version and were drafted to better reflect current practice and copyright administration in libraries. It is likely that many CARL members will adapt the UC guidelines to suit their institutional context. Universities Canada circulated the final, approved guidelines to universities on April 30, 2025.

In celebration of Fair Dealing Week, February 24-28, CARL hosted Rowan Meredith. Meredith, an SJD Candidate at the University of Toronto Faculty of Law, who also holds a JD in Entertainment, Media and Intellectual Property Law from UCLA (2018) and an LLM in Media Law from Queen Mary, University of London (2019) presented on Beyond Marrakesh: Fair Dealing and Creating Accessible Copies of Works for Disabled Persons. The presentation explored fair dealing jurisprudence in Canada and looked at whether and to what extent the creation of accessible copies can be understood as falling under fair dealing. Meredith's presentation illustrated how the application of fair dealing could serve to mitigate the limitations that both Section 32 of the Canadian Copyright Act and Marrakesh Treaty place on libraries with respect to the creation of accessible copies.

ABC Copyright Conference

CARL hosted the ABC Copyright Conference on April 29 & 30, 2025, using CARL's Zoom platform. There were 380 registrants for the event, the largest registration for any Zoom event hosted by CARL. One of CARL's VPOs for Copyright and other public policy matters, Stephanie Savage, presented at the conference and K. McColgan was a member of the planning committee for the conference.

WIPO - CARL Status

On April 7th, CARL obtained official observer status to the WIPO Standing Committee on Copyright and Other Related Matters (SCCR). CARL has been actively engaged for several years in discussions with members of the Canadian delegation on matters related to the work of the SCCR and so with this status, CARL will be able to actively participate in the meetings.

Accessibility

The Association of Research Libraries (ARL) and the Canadian Association of Research Libraries (CARL) took the opportunity of the 14th annual Global Accessibility Awareness Day (#GAAD) on May 15 to encourage libraries and others to discuss, reflect, and learn about digital access and inclusion through the suggestions in [this blog post](#).

CARL responded to a call for feedback on proposed amendments to the Accessible Canada Regulations. As an advocate for increased and equitable access to information for all Canadians, CARL supports the proposed changes that would ensure that technologies used by persons with disabilities can be used with government web pages, contemporary government publications issued as PDFs, and government apps. However, CARL's submission cautioned the government on applying the same regulation and requirement to digitized

archival materials, as doing so would significantly slow digitization of archival collections and decrease overall access to the historical record. CARL encouraged the government to consider an exemption for archival materials and noted jurisdictions that have existing exemptions, such as the United States and European Union. CARL consulted with Libraries and Archives Canada and the Library of Parliament in writing the response.

K. McColgan presented at the IFLA NARD Library Map of the World workshop, the Library Publishing Forum, and the IFLA MLAS webinar series to share CARL's work in the Marrakesh Treaty implementation and in moving accessibility issues in Canada forward. S. Haigh also presented about the IFLA Library Map of the World and CARL's contribution to it on behalf of Canadian libraries at the IFLA session at OLA.

Other Activities

On February 13, 2025, in the context of political decisions affecting cultural institutions in the US, CARL issued [a statement](#) on the Value of National Archives, reminding Canadians of the critical responsibility national archives have in preserving and sustaining a nation's collective memory. CARL highlighted the valued and fundamental role Libraries and Archives Canada has in supporting Canadian sovereignty, maintaining transparency and trust in government and in safeguarding a successful constitutional democracy.

On January 28th, CARL issued a statement in recognition of National Data Privacy week. The statement highlights the concerns that libraries have with educational surveillance tools at post-secondary institutions, such as Proctorio, which actively monitors and collects student data. Coupled with the increasing adoption of [automatic textbook billing models](#), which raise questions about the protection and future use of the data collected, as well as data breaches, CARL has encouraged its members to carefully investigate and review these programs to ensure they are compliant with privacy legislation and that student data is protected.

Access Copyright released a 2025-2028 Strategic Plan, signalling their interest in repairing relationships with educational institutions and "learning more about [their] current copyright management and licensing strategies". The plan also outlines a shift away from a leadership role in copyright advocacy, turning its focus on supporting their members' efforts. Subsequently, CARL met with Access Copyright, at their invitation, because they are considering offering a transactional licensing service.

Management, Advancement and Assessment of Research Libraries

CARL Research in Librarianship Grant

The call for the 2025 cycle of the grant will open in May.

Equity, Diversity, and Inclusion Working Group

Under the leadership of Selinda Berg (Windsor), the working group organized a third webinar in the Inclusive Collections webinar series: From Shelves to Streams: How Format Shifts Impact Diversity in Academic Film Collections, which was held May 2. The working group is also considering developing some content related to accessibility / space planning / universal

design and a virtual seminar proposal on the Impact of current political relations with US on academic libraries in Canada

Librarians' Research Institute (LRI)

The 2025 LRI was cancelled due to the minimum number of participants not being reached.

Evidence Synthesis Institute Canada (ESI)

Another successful ESI Canada was held April 14-17 and welcomed 50 participants. The 2023, 2024, and 2025 versions of ESI Canada were made possible by a partnership between CARL and University of Victoria Libraries. CARL is also partnering with Université Laval to offer a French version of the institute this November..

FLOURISH: BPOC Academic Library Leadership Program

A call for participants was launched on April 30 and will close on July 28th. The first of two in-person workshops will take place November 6th and 7th at the University of Toronto.

Four virtual sessions will be scheduled between December 2025 and April 2026.

The final and second in-person workshop will take place in St. John's, NL, coinciding with the CARL Spring Meeting in the week of May 25, 2026.

Communications Officers Community of Practice ["CommUNITY"]

Since February 2025, the Communications Community of Practice has continued to support knowledge sharing through events like the March "Communi-tea Time" follow-up on AI in library marketing and the May session on current disruptions in library operations. The Steering Committee has also begun planning a half-day online symposium for Fall 2025 focused on key issues in academic library communications.

Equity, Diversity, and Inclusion Community of Practice

Since February 2025, the EDI Community of Practice has hosted two online gatherings: one in February on workplace culture change through an EDI lens and another in April focused on equitable hiring and retention. These sessions have supported deep, thoughtful conversations among members and reinforced the need for a dedicated space for EDI work in academic libraries. Planning is now underway for a June session on accessibility and universal design, and the CoP continues to explore ways to increase regional and linguistic representation, as well as future opportunities for broader community engagement.

Finance Officers Community of Practice

Since February 2025, the Finance Officers Community of Practice Steering Committee has continued to meet regularly, holding planning meetings in February, March, and April to finalize the format and discussion topics for the group's first full meeting which will be held in May.

Assessment Community of Practice

The newly formed Assessment Community of Practice has seen strong early engagement, with over 50 members from across Canada joining the listserv since its launch in January. The planning group—composed of Giovanna Badia (McGill), Christine Brown (University of Alberta), Shahira Khair (University of Victoria), Linda Bedwell (Dalhousie), Taleen Aktorosian (as CARL support), and Julie Morin (as CARL liaison to the SCC)—has met three times since the start of the year to organize the community's first virtual gathering, which will take place

on May 22. This inaugural call will provide a space for assessment professionals to connect, share ideas, and shape the direction of the CoP moving forward.

CARL Impact and Assessment Continuing Education Working Group

CARL's Continuing Education Working Group, chaired by Shahira Khair (UVic), launched the Canadian Assessment CoP (first call on May 22) and the 2025 Canadian Library Assessment Workshop Programming Committee. The latter launched a call for proposals which closes on June 2.

CARL Statistics Program

The CARL Statistics Working Group has been meeting every two weeks since January 14 to review the existing questionnaire and refine survey definitions. The goal is to make the completion process more efficient and timely and to provide clarity and consistency for the data being collected.

Due to an issue with many of the salary data submissions, the 2020-21, 2021-22, and 2022-23 publications have been delayed.

Support to Research Production, Preservation and Dissemination

Open Access - Shared Repositories Infrastructure

CARL continues to provide support to Scholaris, the National Shared Repository Infrastructure Service, namely through the Network of Experts groups led by Gabriela Mircea, CARL VPO for Metadata Strategies and Scholaris . The first official release of the Scholaris Expert Group recommendations occurred in May. The recommendations comprise practical, community-informed metadata guidance developed by the Scholaris Metadata and Discovery Expert Group (S-MDEG), such as recommendations for cleaning metadata during migration, minimum metadata requirements, multilingual considerations, and persistent identifiers. Complementing this work, the Scholaris Electronic Theses and Dissertations Expert Group (S-ETEG) released guidance to support thesis and dissertation harvesting by Library and Archives Canada (LAC) in compliance with LAC requirements.

Scholaris itself has seen significant growth, with 12 schools fully operational and 22 institutions confirmed for the Early Adopter Program. New participants include Queen's, UQAM, Algoma, and Regina. Key updates this year include upgrading to DSpace 7.6.3, expanding service documentation, and creating case studies on non-DSpace migrations, workflow guides and a dedicated resource area on SPOTDocs. Scholaris is also integrating DOI registration with DataCite Canada. The Scholaris team has launched monthly Configurable Entities Working Hours for Early Adopters and members of the Expert Groups, alongside ongoing Community Calls. A Migration Readiness Checklist will be added to TSpace soon. Looking ahead, Scholaris will finalize pricing, refresh committee terms, and hire a summer student for documentation and DSpace 8 testing. The team recently presented at the US/CA DataCite DOI Case Studies Community Call, with more presentations coming soon.

SRIAC met in February and will continue its governance mandate until the end of the early adopter phase in another year. It has advised the Scholaris Expert Groups to continue for another year as well.

Preservation

The @Risk North 3 Summit Report was released in February, following the digital preservation summit held in November 2024. Recommendations included: drafting a multi-year digital preservation action plan; initiating a national benchmarking exercise using the DPC Rapid Assessment Model; and establishing a VPO position for Digital Preservation. A sub-group of the Digital Preservation Working Group has formed to spearhead the benchmarking exercise. A call for expressions of interest in the VPO role was issued in April, and on May 1st, Sarah Lake, Digital Preservation Librarian at Concordia University Library, began her year-long term. As further follow-up to the @Risk North 3 Summit, members of the DPWG are planning two community webinars, one French and one English, to re-engage the digital preservation community, discuss the summit report and present work already underway based on summit recommendations.

Bibliometrics and Research Impact Community of Practice (BRI CoP)

The Bibliometrics and Research Impact Community of Practice (BRI CoP) has continued to foster engagement through two community calls and several journal club meetings since January. Recent sessions covered topics like APC estimation and OpenAlex, and were well attended, with 202 participants and recordings viewed over 150 times. The CoP also welcomed four new members to its Steering Committee. Looking ahead, the group is planning engagement activities at the upcoming BRIC Conference in Montreal, including a poster session. They are also planning a community call on DORA Research Assessment in mid-June.

Canadian Repositories Community of Practice

Since February 2025, the Canadian Repositories Community of Practice Steering Committee has welcomed new members Amber Saundry (UBC) and Brianna Calomino (University of Calgary), and Priscilla Carmini has stepped into the role of Chair. The group hosted two well-attended events: “Repository Horror Stories, Episode I” in February and “Being Trustworthy” in April, which focused on CoreTrustSeal certification. Planning is underway for two summer events, and the mentorship program launched in January continues to run successfully under the leadership of Tim Ribaric.

Library Publishing Community Engagement Team

Since February 2025, the Library Publishing Community Engagement Team (LPCET) has hosted a French-language community call on publishing standards and benchmarks, and advanced development of a documentation hub in partnership with Coalition Publica. The team has also collaborated with Simon Van Bellen on updating journal metadata and met with the Canadian Association of Learned Journals to explore synergies. Plans for the remainder of 2025 include community calls on SSHRC ASJ grant applications and OJS 3.5, collecting impact stories, and continuing to build out the documentation hub.

Open Science/Open Access Policy and Infrastructure Support

On February 25, Canada’s federal research granting agencies - the Canadian Institutes of Health Research (CIHR), the Natural Sciences and Engineering Research Council of Canada (NSERC), and the Social Sciences and Humanities Research Council of Canada (SSHRC) (“the Tri-Agencies”) — released a draft revised Tri-Agency Open Access (OA) Policy on Publications to which CARL responded, highlighting the role of institutional repositories can play to support the policy. The response, *CARL Comments on the Tri-Agency Open Access Policy on*

Publications, was developed in collaboration with the ad hoc group CARL assembled to develop and cost a green OA/repository deposit scenario. Susan and an informal expert group drawn from the Canadian research and scholarly publishing communities continue to develop and provide feedback to the Tri-Agencies to inform the policy's final revisions through s.

Research Data and the Digital Alliance of Canada

Susan continues to engage with the Alliance with respect to its 2025-30 funding strategy and to be a member of its Program Activity Advisory Table. CARL supplied a letter of support to the Alliance's Expression of Interest to ISED to be allocated \$705M in federal AI funding.

Support to Teaching and Learning

Advancing Teaching and Learning Committee (ATLC)

ATLC has been exploring engagement with wellness as an avenue for supporting student success. In February, Ann Gagné (Senior Educational Developer, Accessibility & Inclusion) and Laurie Morrison (Collections Librarian) from Brock University gave a presentation to ATLC on Trauma Informed Practices (TIP) and how this approach can inform library work.

In her capacity as VPO for AI and Library Services, Janice Kung has been networking broadly with those working with AI in the library sphere, including regular meetings with OCUL.

Drawing on the work of the ATLC AI Task Group (2023-2024) and her own new research, Janice Kung engaged in an environmental scan of AI initiatives in the teaching and learning space, an iterative resource to which ATLC members can contribute. Janice has been drafting another resource for ATLC that explores Generative AI applications in several key areas in library work.

After two years of service to ATLC, Navroop Gill has opted not to continue on the committee due to new commitments. Navroop's contributions to the committee, particularly with respect to digital literacy, have been deeply appreciated.

Open Education

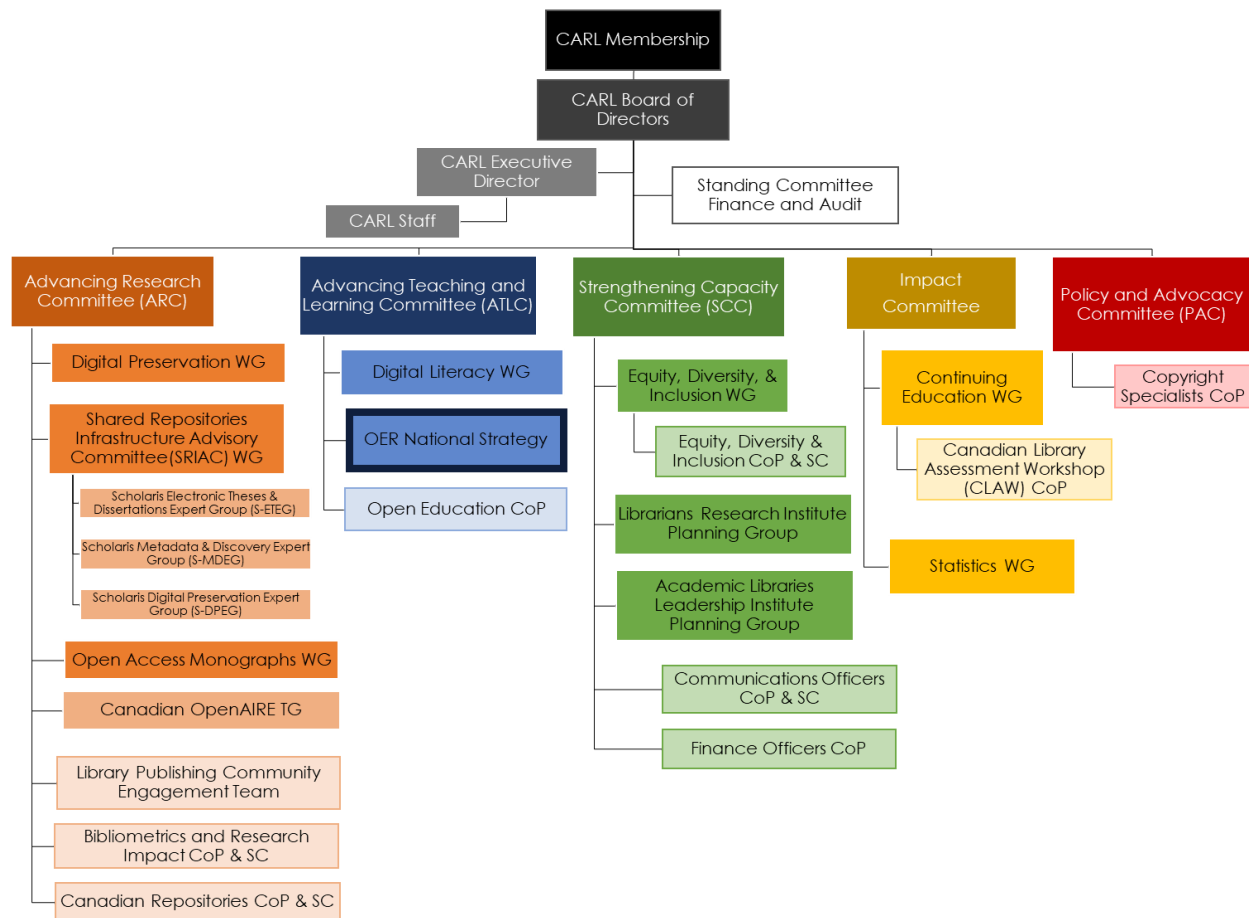
With respect to the OER National Strategy, Lesley Balcom, Catherine Lachaine and Susan attended the first meeting of the Canadian Coalition for Affordable Learning (CCAL), a new Digital Campus Canada initiative, and are in discussion with the CCAL about OER activity and advocacy, respectively and collaboratively.

Open Education Community of Practice

In February, the Open Education Community of Practice (OE CoP) launched and formed its inaugural steering committee of eight members following a call for expressions of interest. A successful membership call brought in over 40 participants. The committee has since met twice, finalizing plans for the first community call, tentatively scheduled for June 18, 2025. The CoP is building on the legacy of the former Open Education Working Group while aligning with the priorities of the Advancing Teaching and Learning Committee and the wider OE community.

Administration & Outreach

Current Committee, Working Group, and Community of Practice Structure (as of November 2024)



Webinar & Community Call Series

CARL continued to host [regular webinars and community calls](#), sometimes in partnership with other groups, on topics of interest to the various library communities of practice that they support, which are free and open to all – both CARL members and non-members.

Conferences, Events, International Meetings

Since the last report, CARL staff have attended events, workshops, webinars and international meetings including: OLA Super Conference and, CFLA National Forum (Toronto), CRKN Virtual Conference, Library Publishing Forum, ABC Copyright Conference, WIPO SCCR 46, FMD Assemblée générale, CALJ AGM, IFLA FAIFE Open Seminar, RLUK (Liverpool), various meetings in the Netherlands with IFLA, LIBER, and SPARC Europe (The Netherlands), ARL (Minneapolis), and INKE Annual Gathering (Wolfville).

Susan Haigh was awarded the Ken Haycock Award during OLA in late January.

CARL Member Transitions

CARL welcomed the Library of Parliament as its newest member on January 7. Christine Ivory was appointed the new Parliamentary Librarian effective October 21, 2024, and will be the primary representative of the Library of Parliament within CARL.

Amanda Etches was appointed University Librarian at Guelph on April 21.

Staff

The current general division of responsibilities is:

- *Susan Haigh – Executive Director*: Overall executive direction and management; lead for CARL advocacy and public policy; outreach and strategic national and international relations;
- *Katherine McColgan – Manager, Administration and Programs*: Board Secretariat; financial and office administration and oversight; support to Policy Committee and advocacy activities; annual statistics program management; CARL privacy officer;
- *Houda Tarib – Administrative Officer & Event Coordinator*: Book-keeping and financial administration; meeting and hospitality arrangements; office management and administrative support; support to Standing Committee on Finance and Audit.
- *Julie Morin – Senior Program Officer*: Support to Strengthening Capacity Committee and Impact Committee; annual statistics program management; E-lert co-editor;
- *Elizabeth Kalbfleisch – Senior Program Officer*: Support to Advancing Research Committee and Advancing Teaching and Learning Committee; E-lert co-editor.
- *Taleen Aktorosian – Communications and Project Officer*: Support CARL's communication channels and selected initiatives, including a variety of pan-Canadian communities of practice; E-lert co-editor.

Visiting Program Officers (part-time)

- *Susan Cleyle – VPO, Leadership Development Initiatives* (September 2021 - September 2025)
- *Janice Kung – VPO, AI and Library Services* (November 2024 – November 2025)
- *Mark Swartz – VPO, Open Science* (November 2024 – November 2025)
- *Rowena Johnson – VPO, Copyright and Other Public Policy Matters* (September 2024 – September 2025)
- *Catherine Lachaine – VPO, Open Education* (January 2025 – January 2026)
- *Gabriela Mircea – VPO, Metadata and CARL Collaboration with OpenAIRE* (August 2023 - August 2025)
- *Stephanie Savage – VPO, Copyright and Other Public Policy Matters* (October 2024 – September 2025)
- *Sarah Lake – Visiting Program Officer for Digital Preservation* (May 2025 - May 2026)
- *Victoria Owen – Special Policy Advisor, Accessibility*

Consultants / On retainer

- *Kathleen Shearer – Research Associate* - RDM, scholarly publishing and open science initiatives.
- *Temple Scott Associates (Don Moors, Josh Matthewman, Ujwal Ganguly)* – Government relations
- *Clark Wilson LLP (Michal Jaworski, Jeff Holloway)* – Contracts
- *Emond Harnden LLP (Sheri Farahani, Lauren Brecher)* – Human resources

- *Gowling WLG (James Plotkin)* – Copyright / Intellectual Property
- *Cain Lamarre (Anaïs L'Heureux-Lefebvre)* – Human resources for Québec

Respectfully submitted,

Susan Haigh,
May 26, 2025