

CARL Executive Director's Report

Tabled at the CARL Board Meeting, November 17, 2025

The following provides an overview of selected activities undertaken or supported by the CARL Office since the September 12, 2025, report to the Board. All past reports are available on the CARL website's [Publications page](#).

Policy and Public Affairs

Federal Government Context

On November 4, Prime Minister Mark Carney tabled his first budget as Prime Minister. While government departments are facing significant spending cuts of up to 15% over the next three years, the 2025 Budget contained some good news for the higher education sector. The federal research granting councils (CIHR, NSERC, and SSHRC) were only required to reduce their budget by two per cent which reflects the government's acknowledgement of the importance of research and innovation to growing the Canadian economy and protecting the councils' important contributions to Canada's global competitiveness and contributing to the economy of the future. Also mentioned was continued support for the implementation of the capstone research organization mentioned in Budget 2024, and fellowships and scholarships investments from 2024 were not reversed with support to an attraction strategy for international talent added. With respect to copyright, the only reform mentioned was to introduce an artist's resale right. Finally, the 2025/2026 budget demonstrated the government's continued support for AI.

Copyright

The Canadian Association of Research Libraries (CARL) and the Canadian Federation of Library Associations (CFLA) released the document *Accessible Content: A Guide to the Canadian Copyright Act on Searching for Accessible Formats and Producing and Distributing Alternate Formats*. This guide provides a clear, practical overview of the laws governing access to and use of copyrighted materials for people with perceptual disabilities in Canada. It covers how these laws are applied, offers a checklist of requirements, shares best practices, and provides practical advice for everyday situations. The guide also includes recommendations on eliminating barriers to access and a glossary of relevant terms. It is available in both [PDF](#) and [EPUB](#) formats.

On September 20 and 21st, Canadian legal scholars, lawyers, copyright specialists, and librarians [met in Toronto](#) to reflect on the state of the Canadian copyright community more than two decades after the landmark decision in CCH Canadian Ltd. v. Law Society of Upper Canada (CCH). Participants heard from those who were intimately involved with the CCH litigation, discussing CCH's legacy and unexplored territory, the impact of CCH on libraries and educational institutions, and what external legal frameworks are actualizing or undermining copyright and user rights. Day two delved into understanding its effect on the international stage and lessons from abroad and looking forward to the future of copyright in the age of language models and generative AI, copyright law and unfulfilled promises and wrapped up with an expert panel reflecting on the conference's key themes in considering the future trajectory of copyright law in Canada and worldwide.

Federal Government Activities

CARL submitted [comments](#) to Global Affairs Canada in response to consultations on the upcoming Canada-US-Mexico trade agreement negotiations. In its response, CARL asks the government to consider preserving current labour provisions that streamline cross border hiring of librarians and recommit to the current CUSMA goal of eliminating discrimination in employment and occupation; retaining the existing Canadian Copyright Act; affirming obligations under the Marrakesh Treaty to Facilitate Access to Published Works for Persons Who Are Blind, Visually Impaired, or Otherwise Print Disabled; reinforcing critical importance of personal information protection and privacy measures; recognizing Canada's obligations under the UN Declaration on the Rights of Indigenous Peoples Act; and ensuring books, journals, periodicals, textbooks, and other printed materials are exempt from tariffs and eligible for duty-free treatment.

CARL also submitted [a brief](#) to Global Affairs Canada's consultation on developing a possible Canada-European Union digital trade agreement. In its memo to the government CARL highlights the need for Canada to strengthen its digital trade and data governance by ensuring robust infrastructure for cross-border data movement, secure local storage, and protection of sensitive and Indigenous data, which can be informed by the work of the Digital Research Alliance. It also suggests that aligning with the European Union's GDPR framework could modernize Canada's privacy laws by providing stronger protections, clearer consent requirements, enforcement mechanisms, and recognition of rights like data erasure. At the same time, noting that advancing digital inclusion through affordable internet, digital literacy, accessibility, and safeguarding principles such as net neutrality and freedom of expression is essential to an equitable digital ecosystem.

CARL was invited to meet online on October 30 with Canadian Heritage's Groupe consultatif externe sur la création et la diffusion d'information scientifique en français/External Advisory

Panel on the Creation and Dissemination of Scientific Information in French. Catherine Lachaine and Susan Haigh emphasized the need for continued and stable funding for OA infrastructure, the need for official languages champions within ISED and/or at the research funding agencies (not just at PCH), the importance of French or bilingual OER as foundational tools for post-secondary education in French, and the important opportunities of new technologies and systems integrations (e.g. through PIDs) to strengthen pan-Canadian bilingual discovery and more fluid content translation.

CARL also met with Luke Guimond, Director of Official Languages, Canadian Heritage to discuss open educational resources. Similar to the meeting mentioned above, Catherine Lachaine and Katherine McColgan discussed the importance of OERs, particularly for the French language element and explored the possibility of funding their development through the Action Plan for Official Languages 2023-2028: Protection – Promotion – Collaboration to reverse the decline of French and promote the vitality of Canada’s official-language minority communities announced in 2023.

Artificial Intelligence

CARL participated in the Innovation, Science and Economic Development Canada (ISED) 30-Day National Sprint, a consultation for Canada’s artificial intelligence (AI) strategy. In [CARL’s brief](#), we focused on three pillars: building enabling infrastructure; education and skills; and research and talent. Our comments were directed to which infrastructure gaps (compute, data, connectivity) are holding back AI innovation in Canada; what Canada can do to ensure equitable access to AI literacy, enhance AI literacy in Canada, including awareness of AI’s limitations and biases, and the skills are required for a modern, digital economy; how Canada can best support their development and deployment in the workforce; and reinforcing Universities Canada’s position on attracting, developing, and retaining top AI talent across research, industry and the public sector.

Other Activities

CARL published [a statement](#) on Chapter Course Readings Services and Copyright that highlights users’ rights under fair dealing. This aimed to address recent developments with a company representing a consortium of Canadian academic publishers contacting libraries and instructors to promote an on-demand course readings service (a service that allows instructors to request individual book chapters from a curated collection of works for delivery to students via course reserves systems or campus bookstores). While CARL supports the rights of instructors and institutions to access and share course materials in ways that meet their educational needs, we were concerned that the service openly posits an interpretation of fair dealing that does not align with Canadian jurisprudence or the education sector’s established best practices.

CARL sent a letter to the National Film Board of Canada expressing our disappointment and surprise by the NFB's Terms of Use, which require that any "institution", defined as a "school, library, community centre, cultural organization, etc." must either secure a per title license or an institutional site-wide license before using "NFB's digital platforms and their content for bona fide educational and research purposes." even though the NFB already distributes much of its catalogue on a free and openly available online streaming platform. In the letter we highlight that publicly-funded cultural and educational institutions must now purchase the right to screen films that are the product of public funds and are otherwise freely accessible online. The NFB office has indicated an interest to meet with CARL, which we are in the process of scheduling.

Management, Advancement and Assessment of Research Libraries

CARL Research in Librarianship Grant

The [2025 grant recipients](#) were announced on September 25, 2025:

- Survey of Course Marking Practices in Canadian Post-secondary Institutions — Katie Harding (McMaster University).
- Past priorities, Present conversations: Academic Librarianship and Labour Organizing in Canada — Ruby Lindsay (University of Saskatchewan) and Jordan Pedersen (University of Guelph).
- Development of Research Library Guidelines for Open Source Research Software — Tomasz Neugebauer (Concordia University)
- Bridging Campus and Community: Librarian and Archivists' Perspectives on Community Engagement in Higher Education — Aleha McCauley (University of British Columbia), Heather De Forest (Simon Fraser University), and Nick Ubels (Vancouver Public Library)

Evidence Synthesis Institute Canada (ESI)

CARL is partnering with Université Laval to offer a French version of the institute, which will run virtually November 24-27. 29 participants have been accepted and instructors have been meeting monthly leading up to the institute.

FLOURISH: BPOC Academic Library Leadership Program

The first of two in-person workshops will take place November 6th and 7th at the University of Toronto. Five virtual sessions have been 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. 14 participants have been accepted into the program.

Equity, Diversity, and Inclusion Working Group

Under the leadership of Selinda Berg (Windsor), the working group organized a [fourth webinar in the Inclusive Collections webinar series](#). There were 60 live attendees.

Equity, Diversity, and Inclusion Community of Practice

A gathering was held on October 22 and included a round-up from the past year, a look at what's ahead, interactive activities such as a “human library” breakout, and opportunities for members to shape future topics and communication tools.

Communications Officers Community of Practice [“CommUNITY”]

The Communications CoP hosted an engaging community call in October exploring evidence-based website redesign in academic libraries led by Caitilin Keenan at UVic Libraries. The session drew strong participation and discussion, prompting an upcoming follow-up November communi-*tea* session focused on sharing practices and lessons learned around web design and development.

The CoP also launched a call for proposals for its first-ever half-day *CommConnect* Virtual Symposium, to be held on February 11, 2026, under the theme *Communicating the Future: Libraries in a Changing Higher Ed Landscape*. The symposium has already received 8–9 submissions for presentations of varying length, with registration expected to open in late December or early January. The CoP is also exploring the possibility of inviting Alex Usher, CEO and Founder of Higher Education Strategy Associates, as keynote speaker.

The Steering Committee has also successfully launched the CoP's new Discord communication platform, which already counts 30 subscribers.

Finance Officers Community of Practice

The Finance Community of Practice continues to meet quarterly to exchange insights and address emerging issues, changes, and opportunities in library financial management. The August meeting focused on the implications of artificial intelligence for library finance practices, while the upcoming November session will explore strategies for effective contingency planning.

CARL Impact and Assessment Continuing Education Working Group

CARL's Continuing Education Working Group, chaired by Shahira Khair (UVic), has continued to oversee the work of the 2025 Canadian Library Assessment Workshop (CLAW) programming committee and the Canadian Assessment CoP planning group. They have also circulated a survey on library assessment in Canadian research libraries which closes on December 31.

Canadian Library Assessment Workshop (CLAW)

A successful CLAW was held October 27-29 at the University of Regina and welcomed 55 attendees.

Assessment Community of Practice

The Assessment CoP gathered on October 3 for the first of two planned events focused on user satisfaction surveys.

CARL Statistics Program

The CARL Statistics Working Group continues to meet every two weeks 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. The 2024-2025 stats cycle closed on October 30.

Support to Research Production, Preservation and Dissemination

Open Access - Shared Repositories Infrastructure

CARL continues its involvement with Scholaris, the National Shared Repository Infrastructure Service. The SRIAC Terms of Reference have been recently updated and approved by OCUL SPOD, and the regional consortia EDs and chairs have reviewed the proposed pricing model for migration and on-going hosting fees, to be finalized by the end of the year.

The Early Adopter Program now comprises 25 institutions, the most recently of which are McGill and Athabasca. Of these, 20 institutions are now live on Scholaris - this includes all institutions from the pilot program and first three cohorts. The most recent institution to launch was Algoma at the start of October. Scholaris continues to receive interest in joining from other institutions.

At the end of October, the Scholaris team completed a first major upgrade of all Scholaris instances to DSpace 8.2, providing for a number of performance improvements, bug fixes, and new features. As part of this work, all PostgreSQL databases were upgraded from version 13 to version 17, and the team hosted an upgrade information session for all Early Adopters. Many new materials have been made available. The Scholaris Branding Guidelines and Communications Kit has been published and includes access to Scholaris logo and promotional materials, guidance on change management, and suggested communication for talking about Scholaris with multiple stakeholder audiences. The Migration Readiness Guide is now available in French, and Scholaris Terms of Use and Privacy Statement have been translated and will be published on the Scholaris site this month.

The CARL-supported expert groups, led by Gabriela Mircea (VPO for Metadata Strategies and Scholaris) have resumed activity after a summer hiatus. Current areas of focus for the Scholaris Metadata and Discovery Expert Group (S-MDEG) include aligning submission forms

with Minimum Viable Metadata, providing guidance on DSpace entities and schema use, reviewing file-level metadata, updating PID recommendations, and exploring import options from external sources. The Scholaris Electronic Theses and Dissertations Expert Group (S-ETEG) is finalizing its work on harmonizing metadata practices and preparing deliverables, and has shared the draft Addressing Non-Traditional Theses recommendation. The Scholaris Digital Preservation Expert Group (S-DPEG) has concentrated on defining shared requirements for preservation workflows and will release four explainers covering What is Digital Preservation and Why It Matters, Access vs. Preservation, Scholaris and Digital Preservation, and How to Talk About Digital Preservation. Members of the expert groups have made several public presentations, including at the ETD Symposium, the Canadian Conference on Open Science and Open Scholarship, and at IPres 2025.

Preservation

The national benchmarking exercise using the Digital Preservation Coalition's Rapid Assessment Model (DPC-RAM) is underway. This initiative of the Digital Preservation Working Group, chaired by Geoff Harder (Alberta), is now in its pilot phase and open to CARL member libraries. Kick-off webinars were held in September, hosted by Sarah Lake (VPO Digital Preservation) and featured a presentation by Anna Perricci, Senior Manager for DPC Americas. Sarah also held two drop-in two "office hours" sessions, with two more currently being planned. The DPWG has also been reviewing the findings from a Canadian digital preservation landscape analysis, conducted by Sarah.

Bibliometrics and Research Impact Community of Practice (BRI CoP)

The Bibliometrics and Research Impact Community of Practice (BRI CoP) continues to offer rich programming that strengthens members' capacity to analyze and apply research impact data. In October, the CoP hosted *Unlocking Institutional Insights with Article Processing Charge (APC) Data from OpenAlex*, where Jack Young and Kelvin Lee (McMaster University) demonstrated how libraries can leverage OpenAlex data to assess and manage open access publishing costs. Looking ahead, the CoP will host a December panel on ORCID adoption and integration across Canadian institutions, featuring speakers from TMU, CRKN, Université Laval, and McMaster. The CoP also continues its monthly Bibliometrics Book Club discussions and is currently seeking a new co-chair following Laura Bredahl's departure from the role.

Canadian Repositories Community of Practice

The Canadian Repositories Community of Practice held its October call titled *Repositories in the Age of AI: The Attack of the Bots*. The session, led by presenters Arran Griffith (Fedora) and Rosalyn Metz (Emory University Libraries and Museum), explored the growing challenge of AI bots harvesting repository content and the resulting technical and ethical implications for libraries, archives, and museums. The session was recorded and well attended. The CoP is also preparing for its second Article Release Party event in December. In anticipation of

launching the second cohort of their Repositories Mentorship Program, a survey was shared with mentors and mentees with the purpose of gathering feedback from participants of its first mentorship cohort.

Library Publishing Community Engagement Team

The Library Publishing Community Engagement Team (LPCET) have had an active summer and fall. Team members delivered a presentation to library directors and associate university librarians ahead of the Canadian Conference on Open Science and Open Scholarship, as well as a lightning talk during the conference itself.

The Library Publishing Primer sub-group has prepared a slide deck version of the Primer, which will be made available under a Creative Commons license. The Documentation sub-group is currently populating its Zenodo repository with resources, and the Community Call sub-group has organized a new series of “coffee chats” to launch in the new year.

Open Science/Open Access Policy and Infrastructure Support

CARL remains engaged in conversations around the revised Tri-Agency Open Access (OA) Policy on Publications and library strategies for its implementation. Susan is in regular contact with Tri-Agency representatives with whom she met in Montreal in October. CARL continues to develop library strategies for its implementation, convening two meetings in October with a range of stakeholders, including representatives from Scholars Portal/University of Toronto Libraries, Coalition Publica/Érudit, and CRKN, to hone possible avenues. Mark Swartz has been tasked with forming a group of practitioner experts to continue this work collaboratively.

CARL was represented at the Canadian Conference on Open Science and Open Scholarship at Concordia University in October, where Susan led a table discussion on policy needs and advocacy.

The Advancing Research Committee has developed a proposal for a Library Support to Accelerate Open Monograph Publishing pilot program. This proposal has been developed with input from ACUP directors. CARL recently met with members of the Federation for the Humanities and Social Sciences to discuss their program of support for publishing monographs in open access (Scholarly Book Awards).

National PIDS Strategy

Susan will continue in her role as chair of CPIDAC until after the March in-person meeting in Ottawa. The new CARL executive director will be welcomed to CPIDAC as an ongoing member, and to attend that meeting.

Research Data and the Digital Research Alliance of Canada

ARC received a presentation from the Alliance about its Canadian Research Data Platform and proposed Data Spaces pilot funding program. VP David Twedell has been invited to participate in the Open Science panel at Montebello. Discussion of research library engagement with the Alliance, and CARL's, will also be discussed with members. .

Susan continues to engage with the Alliance as a member of its Program Activity Advisory Table. Its mandate and membership is being reviewed. There is no confirmation yet about its major new AI funding proposal to ISED (for \$705M), but its RDM and PIDs infrastructure support is fully resourced under the current DRAC funding. Mary Jo Romaniuk has joined Larry Alford and Donna-Bourne Tyson as research library voices on the Alliance Board, and their new CEO, Dr. Michael Schull, starts December 1.

Support to Teaching and Learning

Advancing Teaching and Learning Committee (ATLC)

Members of the Advancing Teaching and Learning Committee completed a SWOT-style exercise to better understand teaching and learning activities and needs at their respective institutions. The results of the exercise have been compiled in a synthesis report and are under discussion by the committee. Janice Kung (VPO for AI and Library Services) has extended her term to the end of 2025 and continues her engagement on CARL's behalf with library stakeholders working in AI. She has issued four installments of a topical AI Digest email series for CARL directors on the following topics: AI Principles, Legal Frameworks, AI Literacy Frameworks, and AI Impacts on Labour.

CARL has been preparing for the upcoming Canadian iteration of the ARL/CNI Futurescape Libraries AI Toolkit Workshop to be held in Ottawa.

Open Education

In September, Mélanie Brunet, Copyright and Affordable Learning Librarian at University of Ottawa, presented report findings and recommendations to *The University of Ottawa Library OER Program: Evaluation Report*, to the Advancing Teaching and Learning Committee. Catherine Lachaine (VPO for Open Education), has been actively engaged in preparing for CARL's consultation with Canadian Heritage's External Advisory Group on the Creation and Dissemination of Scientific Information in French, particularly with respect to the importance of French OERs.

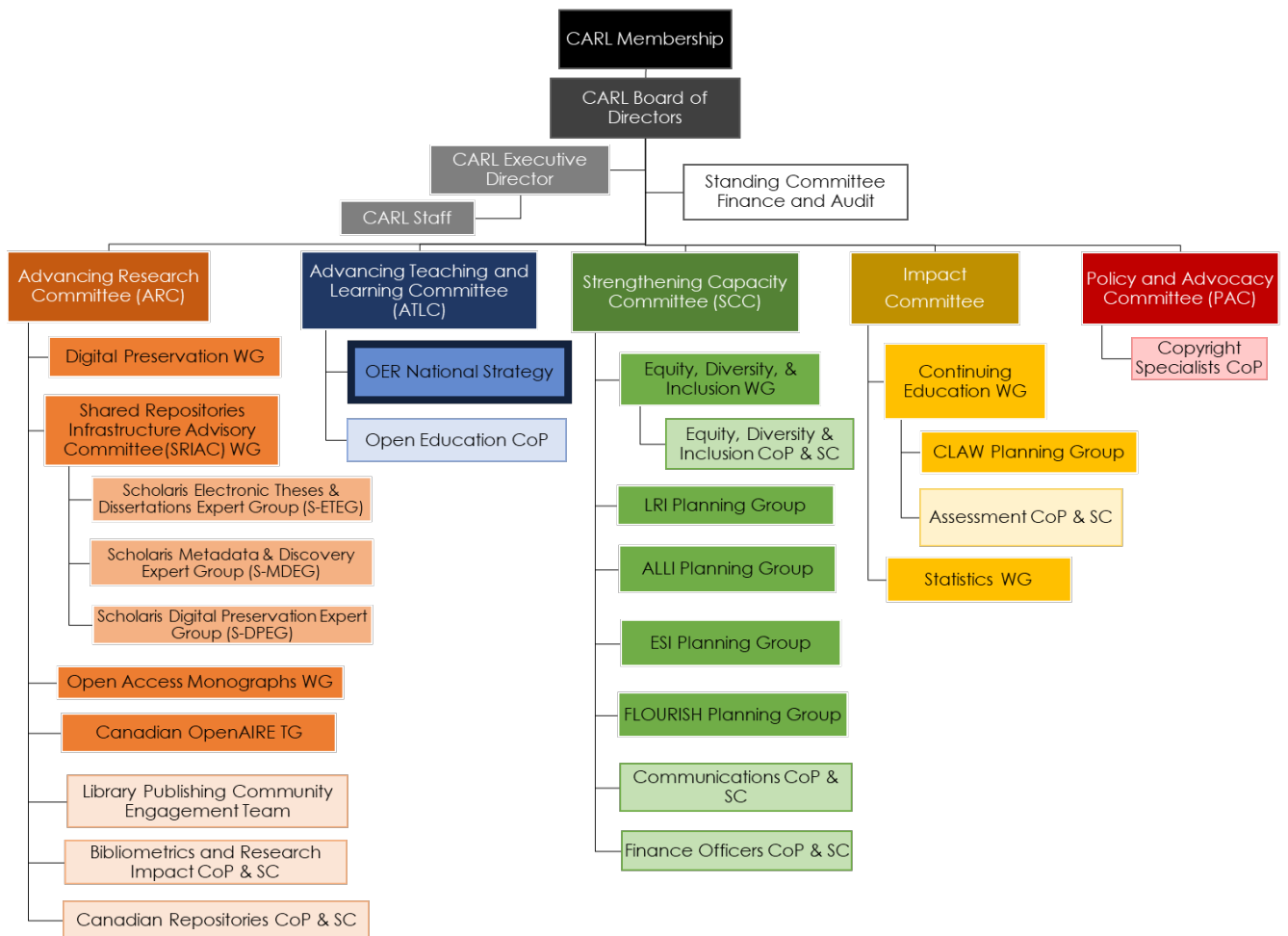
Open Education Community of Practice

The Open Education Community of Practice has been highly active this academic year, hosting monthly community calls that explore emerging issues and innovations in open education. In September, Mélanie Brunet (University of Ottawa) presented *Conducting a*

Program Evaluation of an OER Initiative: Benefits and Challenges, sharing insights into applying utilization-focused evaluation methods to assess and communicate program impact. The October session featured Robynne Devine and Elizabeth Childs, who introduced the *Open GenAI Project*, an initiative developing an AI-powered study companion aligned with open education values such as equity, accessibility, and student privacy. The November call, *Transformation of the OER Landscape: The Role of Artificial Intelligence*, will offer a community-driven discussion on AI's influence on OER creation, adoption, and licensing frameworks. The December session will focus on H5P and accessibility.

Administration & Outreach

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



CARL Website

In early November, CARL launched its refreshed website, featuring a more modern and user-friendly design with a simplified navigation structure and full mobile responsiveness. The new site also introduces an improved events calendar that allows for easier organization and sharing of events, complete with an intuitive calendar view. Work will continue in the coming months to further enhance the site's publications section.

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 attended events, workshops, webinars and international meetings including: Copyright Law Annual Conference (Toronto; Katherine), KULA Launch Symposium (Victoria; Susan), ARL (Washington; Susan), CRKN Member Summit (Halifax; Susan), Canadian Conference on Open Science and Open Scholarship (Montreal; Susan, Elizabeth), CSAE 2025 (Victoria; Katherine), Congrès des professionnels et professionnelles de l'information (Laval; Taleen, Katherine), IARLA (Virtual; Susan), and LAC Stakeholders Forum (Susan).

CARL Member Transitions

While three announcements of retirements were made (Toronto, British Columbia, and New Brunswick), there were no new appointments in this reporting period.

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 2026)
- *Janice Kung – VPO, AI and Library Services* (November 2024 – December 2025)
- *Mark Swartz – VPO, Open Science* (November 2024 – November 2026)
- *Rowena Johnson – VPO, Copyright and Other Public Policy Matters* (September 2024 – September 2026)
- *Catherine Lachaine – VPO, Open Education* (January 2025 – January 2026)
- *Gabriela Mircea – VPO, Metadata and CARL Collaboration with OpenAIRE* (August 2023 - September 2026)
- *Stephanie Savage – VPO, Copyright and Other Public Policy Matters* (October 2024 – September 2026)
- *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,
November 17, 2025