

## CARL Executive Director's Report

Tabled at the CARL Board Meeting, January 27, 2026

The following provides an overview of selected activities undertaken or supported by the CARL Office since the November 17, 2025, report to the Board. All past reports are available on the CARL website's [Publications page](#).

### Policy and Public Affairs

#### Federal Government Context

The House of Commons rose in mid-December and is not scheduled to return until January 26th so work of the committees is expected to ramp up at the end of the month.

Just before the break, Marc Miller stepped in to replace Steven Guilbeault as the Minister of Canadian Identity and Culture. CARL will work to connect with Minister Miller's office and ensure he is aware of our advocacy priorities.

#### Copyright

The annual OLA Copyright Symposium ran over a few dates in late November and early December. Session topics included Accessibility, Rights Retention and Indigenous Data Sovereignities. A full description of events is available at <https://copy25.vfairs.com/en/#theme-agenda>.

Katherine McColgan represented CARL at the World Intellectual Property Office Standing Committee on Copyright and Other Related Matters meeting in Geneva, December 1 - 5, 2025. Joining with members of the Access to Knowledge (A2K) Coalition, CARL engaged in advocacy efforts with government officials to discuss continued problems with the Broadcasting Treaty and pushing forward with a work plan on limitations and exceptions. It was an opportunity to meet with officials from ISED and Heritage in an informal way to continue to socialize CARL's advocacy efforts here in Canada.

#### Federal Government Activities

In the Fall of 2025 the Federal Government released its Budget Implementation Act (Bill C-15). Within that Bill are proposed amendments that would see postal rates increase substantially for Libraries and other services providers who send materials in the mail to patrons. Referred to as the "Library Book Rate", this reduced shipping rate has subsidized ILL costs and made it possible to send materials to those who have visual impairments at no cost. The library community is understandably very concerned about any changes to this program and is

currently undertaking an advocacy campaign targeted at getting these proposed amendments removed from Bill C-15. CARL has submitted letters to the responsible Ministers and has made a request to appear before the respective committees. We have also engaged in a group effort with CULC, CELA, and NNELS on the matter.

### **Artificial Intelligence**

CARL, together with co-sponsors OCUL, Library and Archives Canada, University of Ottawa, and Carleton University, organized the first Canadian iteration of ARL/CNI's Futurescape Libraries AI Toolkit Workshop aimed at library leadership. Forty participants – including members of 19 CARL libraries – gathered in Ottawa at LAC, on December 15–16, 2025 to take part in the workshop. The one and a half day event was facilitated by Keith Webster of Carnegie Mellon University with support from Catherine Steeves in her capacity as Program Director, AI & Machine Learning at OCUL. Participants worked through a series of scenarios in exercises designed to empower research libraries in the rapidly changing AI-influenced research ecosystem. In advance of the workshop, CARL translated the foundational ARL/CNI Futurescape Libraries AI Toolkit into French to broaden access to this resource. Discussions are currently underway with OCUL about follow up activity including a possible online iteration of the workshop.

Amanda Wheatley (McGill) joined CARL as VPO for AI and Library Strategies on January 15th. Janice Kung completed her term as VPO for AI and Library Services at the end of December, having extended it by one month to assist with preparations for the Futurescape Libraries AI Toolkit Workshop. She also issued a fifth and final missive as part of her AI Digest for CARL Directors series, this one on AI and Environmental Impacts.

Katherine McColgan represents CARL in the LAC Stakeholders Community of Interest: AI Working Group which brings together representatives from the library community to work on national issues related to the library community. The working group is currently looking to undertake an environmental scan of activities in Canada to help identify areas of commonality and expose gaps.

## **Management, Advancement and Assessment of Research Libraries**

### **CARL Research in Librarianship Grant**

The [2025 grant recipients](#) were announced on September 25, 2025. The 2026 grant cycle will open in April.

### **Evidence Synthesis Institute Canada (ESI)**

A French version of the institute ran virtually November 24-27. 29 participants and two learning facilitators attended, and the results of the evaluation survey were very positive. The event was led by Emmanuelle Raynard (Université Laval) and the rest of the instructor team: Elyse Granger and Daniela Zavala Mora (Université Laval), Patrick Labelle (University of

Ottawa), and David Patenaude (Université de Montreal). Planning for ESI 2026 (in English) began in January and the call for participants will close on February 2.

### **FLOURISH: BPOC Academic Library Leadership Program**

Following a successful two day in-person workshop held on November 6th and 7th at the University of Toronto, a virtual session was held on December 1. 4 additional virtual sessions have been scheduled for January 19, February 9, March 16, and April 20, and the final in-person workshop will take place in St. John's, NL, coinciding with the CARL Spring Meeting in the week of May 25, 2026.

### **Equity, Diversity, and Inclusion Community of Practice**

Since the end of November, the EDI Community of Practice convened on December 4 for a community gathering focused on building and sustaining hope, joy, and resilience in EDI work. The session featured small-group discussions on finding hope and joy in EDI practice, strategies for self-care beyond the workplace, and cultivating critical hope in the face of global and institutional challenges, complemented by a chair yoga session and guided meditation. The Planning Group met on December 16 to reflect on the gathering, plan upcoming meetings for the coming year, and explore ideas to deepen engagement across the community.

### **Communications Officers Community of Practice ["CommUNITY"]**

Since the end of November, the Communications Community of Practice hosted one Communi-tea session focused on sharing practices and lessons learned related to web design and development, serving as a follow-up to the previous session on web redesign.

Planning for the CommConnect Library Communications Virtual Symposium is well underway. The free, half-day symposium will take place on February 11 (11:00 am–3:30 pm ET) via Zoom. The program is finalized, registration is open, and promotion has been carried out through CARL channels and partner networks. The group secured Joe Friesen, higher education reporter at The Globe and Mail, as keynote speaker in an interview-style conversation with Mark Asberg (Queen's University). With just under a month to go, the event has already attracted over 130 registrants.

### **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 November session on strategies for effective contingency planning was cancelled due to insufficient participation. The planning group will meet in January to schedule sessions and topics for the new year, as well as discuss engagement strategies.

### **CARL Impact and Assessment Continuing Education Working Group**

CARL's Impact and Assessment Continuing Education Working Group, chaired by Shahira Khair (UVic), went on hiatus following the successful delivery of CLAW and will resume meeting monthly on January 16.

## Assessment Community of Practice

The Assessment CoP gathered on October 3 and November 14 for two planned events focused on user satisfaction surveys. The first session was on everything you need to know about surveys (methodology). The second session was discussion based and focused on pros and cons of different providers (purchasing and developing your own). The planning group met on January 6 to plan for the next call on key performance indicators.

## 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 and password protected spreadsheets of data from 2020-2024 are available on CARL's website.

## 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 Early Adopter Program is ongoing with 21 institutions now live on Scholaris infrastructure, the most recent to join was Queen's, which launched January 12. The initial two-year program is slated to run until the end of April, at which point the service will shift into a 'Phase II' development to continue building capacity for an operational service.

All Scholaris sites were updated to DSpace 8.3 in early January. This update addresses a vulnerability issue related to how DSpace extracts text from PDF files, and it also restores support for role-based authentication—something many Scholaris subscribers who use Shibboleth have been asking for. In November and December, the Scholaris service team ran two testing sessions on Configurable Entities for the Scholaris Metadata and Discovery Expert Group (S-MDEG) to support the update of their [Entities Guidance](#). Session resources have been shared with the Scholaris subscriber community to support collective learning. Scholars Portal has also contributed the ETD-MS metadata format back into DSpace so it will be included by default in a future release (D10). This contribution responds to recommendations from S-EATEG and S-MDEG, as well as LAC requirements to use ETD-MS for thesis-related metadata.

The Scholaris [Terms of Use](#) and [Privacy Policy](#) are now available on the Scholaris website.

The CARL-supported expert groups, led by Gabriela Mircea, VPO for Metadata Strategies and Scholaris, have made good progress. Current areas of work for 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. Over the last few months, the group has focused on entities, deepening their understanding of how best to take advantage of their functionality. The Scholaris Electronic Theses and Dissertations Expert Group (S-EATEG) is

nearing completion of its work on developing recommendations for addressing alternate format theses. In addition to this, the group continues to provide updates on the findings from the Needs Assessment Survey, which has offered valuable insights into current practices and challenges. They are also actively working on creating clear and practical guidance for managing ETD workflows within DSpace. The Scholaris Digital Preservation Expert Group (S-DPEG) has concentrated on defining shared requirements for preservation workflows and has completed and released four explainers designed for both staff and end-users. The review of DSpace preservation functionality is nearly complete, with final checks underway. Work is also progressing on a Preservation Service Model and developing a comprehensive Digital Preservation Toolkit.

The progress achieved reflects not only technical excellence but also the passion and collaborative spirit of the expert group members. All recommendations released so far have been translated into French.

### **Preservation**

The first phase of the national benchmarking exercise using the Digital Preservation Coalition's Rapid Assessment Model (DPC-RAM) concluded on December 31st. A total of 20 submissions were received – 15 English and 5 French – and are now being reviewed by project leaders, Sarah Lake (VPO Digital Preservation) and Amanda Tomé (Alliance) on behalf of the Digital Preservation Working Group. Amanda presented *Benchmarking a Nation: The National DPC RAM Benchmarking Project* on behalf of the DPWG at the DPC RAM-JAM in December. Sarah completed a preliminary Canadian Digital Preservation Landscape Analysis that includes repositories, associations, coalitions and working groups and their mandates and will be working with a sub-group to further develop this resource. The DPWG is currently examining how to mobilize training opportunities for the digital preservation community, following recommendations from last year's @Risk North 3 Summit Report.

At the November members' meeting in Montebello, Quebec, CARL awarded Geoff Harder, chair of the DPWG, with the CARL Award of Merit. The award was presented in recognition of Geoff's extraordinary leadership, vision, and sustained contributions to Canada's academic library community, particularly in the areas of digital infrastructure, preservation, and open scholarship.

### **Bibliometrics and Research Impact Community of Practice (BRI CoP)**

The Bibliometrics and Research Impact Community of Practice met in December for a panel on ORCID adoption and integration, featuring speakers from Toronto Metropolitan University, CRKN, Université Laval, and McMaster University. The session attracted 76 participants. The group has continued its monthly planning meetings into the new year and is actively preparing upcoming community activities, including two events in February: a webinar on Resilient Knowledge: Trust, Mistrust, and Manipulation of Open Science Research, presented by Leslie McIntosh (Digital Science), and the launch of a new informal "Coffee Talks" series, beginning with a session on assessing research impact in the humanities and social sciences. In addition, a monthly book club series is being planned for the winter term. Julie Morris (University of New Brunswick) has joined the leadership team as a new co-chair, succeeding Laura Bredahl (University of Waterloo).

### **Canadian Repositories Community of Practice**

The Canadian Repositories Community of Practice met in December for its second Article Release Party, featuring guest speakers Laura Rothfritz and Lisa Matthias (Germany), who presented on their article *Current challenges and future directions for institutional repositories: A systematic literature review*. The session attracted 35 participants. Planning is underway for the second cohort of the Mentorship Program, with the registration form to be shared in February. The next CoP event is scheduled for late February and will focus on a knowledge exchange discussion on repository sustainability, staffing, and maintenance. In addition, the Steering Committee has submitted a proposal to Open Repositories 2026 to present on how the community of practice has been built and sustained over time through its events and programming.

### **Library Publishing Community Engagement Team**

The Library Publishing Community Engagement Team (LPCET) continued its active meeting schedule. In December, the team wrapped up several outstanding projects, including announcing the new Coalition Publica Zenodo documentation hub to the library publishing community, running the coffee chats program, and completing a slide deck about library publishing basics to be shared with practitioners.

As several team members' terms wrap up early in the new year, the LPCET issued an open call for new members and is reviewing the status of its working groups and projects, with an eye to planning for the next two years.

### **Open Science/Open Access Policy and Infrastructure Support**

CARL continues to engage with the Tri-Agency and other stakeholders on the revised Tri-Agency Open Access (OA) Policy on Publications. Through November and December, Mark Swartz, VPO for Open Science, convened a group of practitioner experts including representatives to develop a series of potential scenarios for facilitating open access in anticipation of the new policy. This document was shared with the Tri-Agency in December. On January 23, Katherine and Mark joined stakeholders from Scholars Portal/University of Toronto Libraries, Coalition Publica/Érudit, and CRKN, for a meeting called by Tri-Agency representatives to discuss the policy and implementation strategy.

The Advancing Research Committee has initialized the Library Support to Accelerate Open Monograph Publishing pilot program following approval at the Fall member meeting. In late November, Susan Haigh met with Brian Scrivenor from ACUP in Ottawa to discuss final revisions to the terms of the pilot. In late December, CARL members were sent a survey through which they could indicate their financial commitment to the program for the duration of the two-year pilot. A selection committee will be struck in the coming weeks to oversee the allocation of funds.

A renewed open science action plan for the Canadian research library community was drafted and made available to CARL directors for commentary and revision. The document will be further developed in collaboration with CRKN, with whom it has been shared.

Elizabeth and Catherine Lachaine contributed a commentary to a piece on Bilingualism and Scholarly Publishing, part of the Policy Insights and Signals Reports from the Open Scholarship Policy Observatory.

### **National PIDS Strategy**

Susan Haigh, John Aspler, and the team are working on revising the summary of the national strategy and plan to issue it shortly. Susan Haigh will attend and chair the late-March in-person all-day meeting in Ottawa (date is to be determined).

### **Research Data and the Digital Research Alliance of Canada**

The new Board met in December for the first time with the newly appointed CEO. They continue to wait for confirmation of its AI funding proposal to ISED for \$705M.

Dr. Michael Schull, new CEO of the Alliance, addressed the community at a Town Hall held on January 15 and during which updates relating to the Sovereign AI Compute Strategy were provided. University of Toronto was awarded \$42.5M of the \$83.5M funds via the Alliance's National AI Compute – Rapid Deployment program, as announced November 28. The Alliance is currently in discussions with select institutions nationwide with whom to collocate its infrastructure as part of the Distributed Storage and Compute Grid pilot. Applications for the \$2.25M Research Software Platforms funding are undergoing final review. Information gathered in November focus groups as part of the National Data Spaces pilot will be shared via a soon to be released position paper. A data summit is being organized for the spring/early summer.

## **Support to Teaching and Learning**

### **Advancing Teaching and Learning Committee (ATLC)**

Following committee discussions on the findings of last fall's SWOT-style exercise on teaching and learning activities, the Advancing Teaching and Learning Committee is establishing a community of practice for teaching and learning library practitioners. A call for members announcement and terms of reference are under development. Catherine Lachaine completed her term as VPO for Open Education in January.

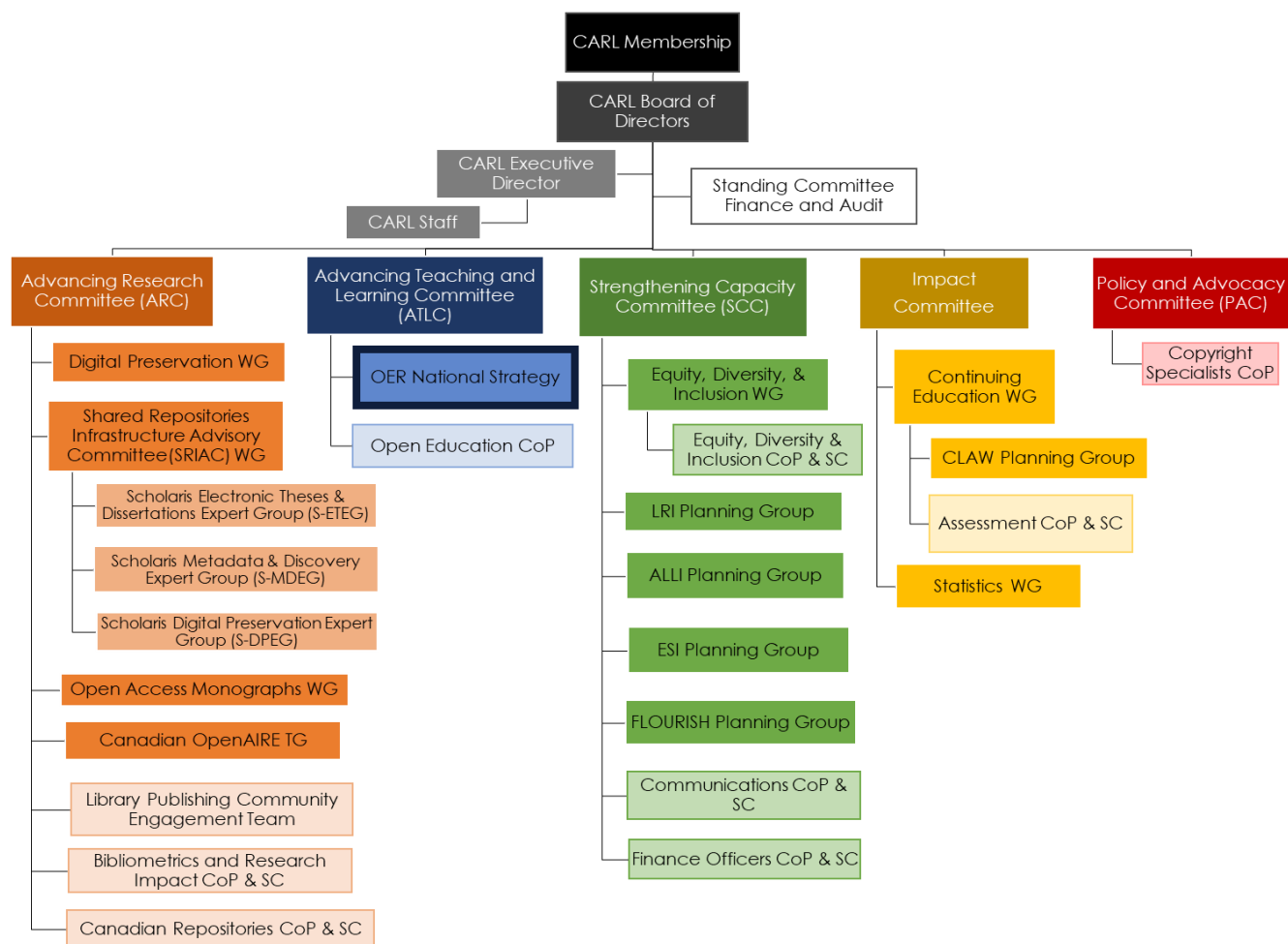
### **Open Education Community of Practice**

The Open Education Community of Practice hosted two community calls in November and December. The November session, Transformation of the OER Landscape: The Role of Artificial Intelligence, featured a community-driven discussion on AI's influence on OER creation, adoption, and licensing frameworks. The December session focused on H5P and accessibility, with guest presenters Shauna Roch and Jason Benoit (Fanshawe College). Catherine Lachaine is stepping down from the Steering Committee, and the community will be seeking a new co-chair. The next CoP session will take place on February 2, featuring a

presentation on Kwantlen Polytechnic University's Zero Textbook Cost program, shared by Amanda Grey, Open Education Strategist.

## 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 attended events, workshops, webinars and international meetings including: WIPO SCCR, Futurescape Workshop, Lobbyist Commissioner lunch and learn,

### CARL Member Transitions

Christine Shaw began as Acting University Librarian at the University of Manitoba on January 1, 2027.

### Staff

The current general division of responsibilities is:

- *Katherine McColgan*
  - *Acting Executive Director*: Overall executive direction and management; lead for CARL advocacy and public policy; outreach and strategic national and international relations; and continues managing her other duties as
  - *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)

- *Amanda Wheatley – VPO, AI and Library Strategies* (January 2026 – January 2027)
- *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, Digital Access Policy* (September 2024 – September 2026)
- *Catherine Lachaine – VPO, Open Education* (January 2025 – January 2026)
- *Gabriela Mircea – VPO, Metadata Strategies and Scholaris* (August 2023 - September 2026)
- *Stephanie Savage – VPO, Copyright and Other Public Policy Matters* (October 2024 – September 2026)
- *Sarah Lake – VPO 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,

Katherine McColgan, Acting Executive Director

January 27, 2026