CARL Executive Director's Report

Tabled at the CARL Board Meeting, September 11, 2026

The following provides an overview of selected activities undertaken or supported by the CARL Office since the May 25, 2026 report to the Board. All past reports are available on the CARL website's Publications page.

Policy and Public Affairs

Federal Government Context

On August 31, 2026, byelections were held for three ridings with the Liberal Party winning all three, one of which (Chicoutimi–Le Fjord) was previously held by the Conservative Party, helping the Liberal Party to maintain a slim majority in the House.

The House of Commons rose for the summer June 19th, but in the weeks leading up to the House rising, the government put forward two long-awaited pieces of draft legislation; Bill C-36 - An Act to enact the Protecting Privacy and Consumer Data Act, to amend the Personal Information Protection and Electronic Documents Act and to make amendments to other Acts, and Bill C-34 - An Act to enact the Digital Safety Act and the Digital Safety Commission of Canada Act and to make consequential amendments to other Acts (short title: Safe Social Media Act). Both Bills reached first reading and will be brought back to the House for second reading at the end of summer break. CARL will be working over the summer to prepare its submissions for when the legislation goes to committee.

Federal Government Activities

Michael Vandenburg and Katherine McColgan met with staff at Innovation, Science and Economic Development (ISED) to discuss plans for the roll out of Canada's national AI strategy and the important work that research libraries do in the areas of data sovereignty and security, national infrastructures and trusted data repositories. At the same time, we signaled our interest in participating in the national advisory council.

Michael Vandenburg and Stephanie Savage held a separate meeting with ISED to discuss our interest in copyright matters, AI, and research in French.

Artificial Intelligence

CARL has partnered with ARL for the fourth iteration of its AI Quick Poll. Amanda Wheatley (McGill; CARL VPO for AI and Library Strategies) has been working with Leo Lo and Cynthia Hudson-Vitalie to adapt the poll for the Canadian research library context; the AI Quick Poll will be issued this fall. Wheatley also issued the eighth edition in the AI Digest series for CARL Directors on *AI and NotebookLM*.

On September 1st, CARL welcomed former UNB Dean of Libraries Lesley Balcom as CARL VPO for AI Integration and Library Leadership. In this role, Lesley will provide national leadership and strategic insight into how research libraries can navigate and shape the transformative impact of AI across all areas of their work and support CARL in the development of a cross-committee task force on AI.

CARL issued a response to Canada's National Artificial Intelligence strategy: AI for All, recognizing the government's work for engaging in broad consultations prior to authoring the strategy and for gathering perspectives from diverse stakeholders, noting that some of CARL's recommendations, including privacy, literacy and equitable access to AI, are included in the strategy. The statement highlights that research libraries are conspicuously absent from the strategy as named partners, noting research library community's role for providing foundational infrastructure for the universities, researchers, students, supporting the critical literacy efforts identified in the strategy and leveraging their central role in the research ecosystem to secure the data infrastructure, scholarly resources, and information environments on which AI research and education depend. CARL calls upon the Government to formally recognize research libraries as partners in the National AI Literacy Initiative and in the broader knowledge infrastructure the strategy seeks to build.

Katherine McColgan (CARL) and Katherine Klosek (ARL) participated in and ARL Leadership Fellows Program educational session to discuss the important role that advocacy plays for the work of libraries and discuss the advancements in AI on campus and how different policy issues, such as copyright, licensing, etc. affects the ability to use AI tools for research on campus.

Access to Information

CARL submitted comments on the government's review of the Access to Information Act, recommending the government adopt processes that are more in line with similar jurisdictions, calling on the creation of a publication scheme, systems for proactive disclosure and declassification, ensuring fair and equitable access to information, and setting protocols for managing Indigenous knowledge.

Management, Advancement and Assessment of Research Libraries

CARL Research in Librarianship Grant

The 2026 grant cycle closed on August 15 and the application review panel is scheduled to meet on September 23. 18 applications were received.

FLOURISH: BPOC Academic Library Leadership Program

The final in-person workshop was held May 24-25 in St. John's, NL (overlapping with the CARL Spring Meeting). Certificates of completion were presented during the CARL President's Reception.

Librarians' Research Institute

16 participants completed the 2026 Institute, which was held at the University of New Brunswick from June 22-25 and delivered by the 2026 peer mentor team: Patrick Gamsby (Chair - Memorial University), Alicia Cappello (Queen's University), James Doiron (University of Alberta), Katie Lai (McGill University), and Desmond Wong (University of Toronto).

CARL Impact and Assessment Continuing Education Working Group

CARL's Impact and Assessment Continuing Education Working Group, chaired by Shahira Khair (University of Victoria), went on hiatus over the summer, but subgroups continued to meet to oversee the activities of the Assessment Community of Practice, complete the CLAW program evaluation (which included three focus group sessions), and to finish reviewing the results of the Survey on Library Assessment in Canadian Research Libraries; a final report will be available soon. A call for a host institution for CLAW 2027 will also be circulated shortly.

CARL Statistics Program

The revised questionnaire and definitions prepared by the Statistics Working Group were shared with the broader community of stats submitters for feedback via an anonymous survey. The group is in the process of reviewing the responses received. In the meantime, the current questionnaire will continue to be used for the upcoming 2025-2026 collection cycle.

Support to Research Production, Preservation and Dissemination

Open Access - Shared Repositories Infrastructure

CARL maintains its connection to Scholaris, the National Shared Repository Service. Scholaris has entered Phase II, with 26 of 29 institutions now live, the most recent of which is Trent University. The Phase II agreement has been reviewed and approved by regional consortia, with the final agreement to be ready in the coming weeks. The structure for the new, shared governance group with Borealis is now in place. The regional consortia have provided representation and the Terms of Reference have been approved. The group will meet for the first time this fall. As of September 1st, Scholaris is receiving additional support from a newly-hired 0.5 FTE Scholarly Publishing and Repository Services Librarian.

The CARL-supported Scholaris Experts Groups, led by Gabriela Mircea (Calgary; CARL VPO for Metadata Strategies and Scholaris) have had an active summer as they near the completion of their second term. Four documents were issued for community feedback: *Minimum Viable Metadata Recommendations 1.1* and *Entities Guidance and Advice 2.0.* from the Scholaris Metadata and Discovery Expert Group (S-MDEG), and *A Digital Preservation Toolkit for*

Institutional Repositories and *Digital Preservation / DSpace / Scholaris Glossary* from the Scholaris Digital Preservation Expert Group (S-ETEG).

Individuals who served on the groups – S-MDEG, S-ETEG, and the Scholaris Digital Preservation Expert Group (S-DPEG) – came together on September 3rd for a community call to provide feedback and be thanked for their significant contributions to the initiative. This meeting was led by Gabriela and Julia Gilmore (Scholars Portal/Scholaris Service Lead). A second wrap-up session will be held later in September.

Preservation

In June, members of the Digital Preservation Working Group (DPWG) enjoyed presentations by Wendy Hagenmaier (Yale) on *Software Preservation and Emulation at Yale: Intro to EAASI* and Eric Kaltman (Alberta) on *Emulation Research and Pedagogy*. Sarah Lake (Concordia; CARL VPO for Digital Preservation), who chairs the DPWG, continues to lead work on the national benchmarking exercise using the Digital Preservation Coalition's Rapid Assessment Model (DPC-RAM). In June, CARL hosted two "office hours" sessions, one French language and one English, to support those engaged in the benchmarking. When the submission period for the second phase of the project closed at the end of June, 27 submissions had been received. Members of the responsible sub-committee are currently studying the data gathered and working on a final report.

Open Science/Open Access Policy and Infrastructure Support

CARL continues to be in contact with the Tri-Agencies and other stakeholders in advance of the publication of the revised Tri-Agency Open Access Policy on Publications (OA Policy). CARL has collaborated with the Tri-Agencies to identify publishers that need to be informed about researcher rights retention under the OA Policy, as well as addressing coordinated approaches to support the development of institutional strategies. Steps have been taken towards the establishment of Tri-Agency Open Access Policy Implementation Steering Committee, including drafting terms of reference, to provide strategic leadership, coordination and oversight for community-led initiatives to support Policy implementation.

In June, CARL released two statements with respect to Open Science. The first, Advancing Open Science: CARL Pillars for Action and Engagement (2026 – 2027), laid out three pillars to guide engagement: Policy Coordination & National Alignment, Support Researcher Activities & Open Access Publishing, and Community Partnerships & Capacity Building. The second, a joint statement CARL and CRKN Affirm Ongoing Shared Commitments to Open Science signaling the two organizations' ongoing coordination of efforts around the Tri-Agency Open Access Policy on Publications and digital research infrastructure, as well as the potential to develop a new roadmap in the spirit of *Towards Open Scholarship: A Canadian Research and Academic Library Action Plan to 2025*.

CARL is partnering with the Association of Research Libraries (ARL) on a joint Open Strategies Survey as follow-up to previous surveys on library investment in open scholarship (CARL 2020; ARL 2022). A working group composed of ARC chair Amy Buckland (Concordia) for CARL and

Shan Sutton (Arizona) and Sarah Shreeves (Utah) for ARL has met twice and work on the survey instrument is underway. The survey will launch in the new year, with results to be shared at the joint CARL/ARL spring meeting.

Preparations are underway for the Institutional Open Science Exchange Workshop for library directors and other representatives from their institutions. This event, co-organized with the University of Ottawa Library, will be held immediately following the Canadian Open Science Conference in October.

Support to Teaching and Learning

The Advancing Teaching and Learning Committee (ATLC), chaired by Nicole Nolan (Brock), refreshed its work plan in response to feedback gathered from the membership at the CARL Spring Meeting and in anticipation of an influx of new committee members in September.

Communities of Practice

CARL's Communities of Practice (CoPs) continued to provide opportunities for knowledge sharing, discussion, and collaboration across the research library community during the spring and summer. Several CoPs, including Assessment, Communications, Bibliometrics and Research Impact (BRI), Finance, and Teaching and Learning, paused their activities over the summer, with plans to resume in the fall.

The Equity, Diversity, and Inclusion (EDI) CoP held a session in June in partnership with the CAPAL Social Justice Committee. Speakers Karen Nicholson (Guelph) and Maura Seale (Michigan) led a thoughtful and engaging discussion exploring the intersections of assessment, information literacy, and Indigenization, equity, diversity, inclusion, and accessibility (IEDIA) work in higher education.

The Open Education (OE) CoP hosted a session in June exploring different approaches to course marking and cost indicators. Katie Harding (McMaster), Samantha Read (St. Francis Xavier), and Rebecca Shortt (BCcampus) shared approaches and discussed how institutions can use cost indicators to strengthen OER awareness, improve data collection, support affordable learning strategies, and reduce barriers for students.

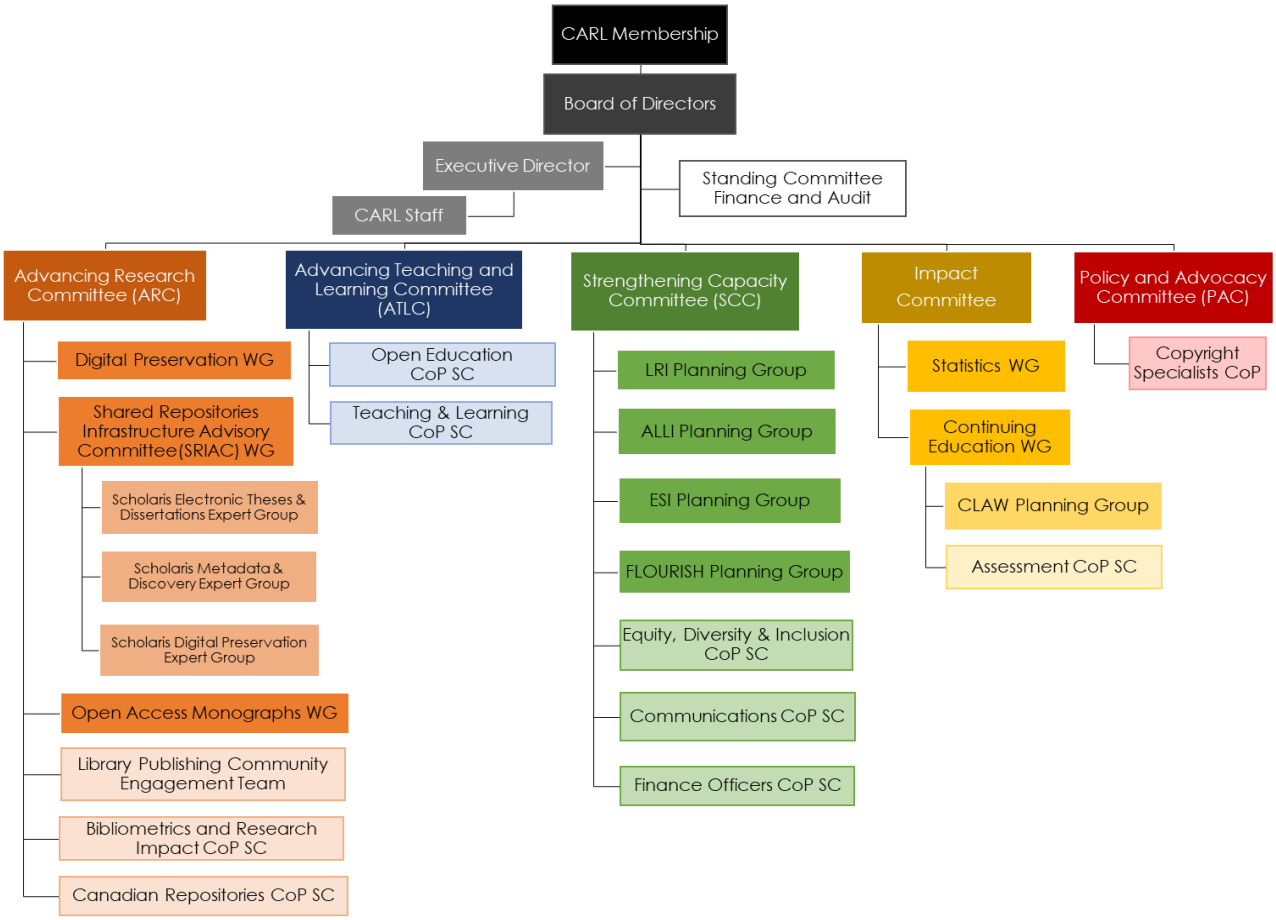
The Canadian Repositories CoP hosted a conference roundup session in July, bringing together attendees from across scholarly communication and repository conferences to share key takeaways, resources, and insights from recent events.

The Library Publishing Community Engagement Team (LPCET) has relaunched its Library Publishing Links mentorship program, matching up practitioners for informal virtual conversations throughout the year.

Overall, the CoPs continue to serve as member-led spaces for peer learning and exchange on issues of shared interest across the Canadian research library community.

Administration & Outreach

Current Committee, Working Group, and Community of Practice Structure (as of May 2026)



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, International Meetings, and Professional Development

Since the last report, CARL staff attended events, workshops, webinars and international meetings including: ARL Leadership Fellows Educational Session, IFLA Libraries Serving Persons with Print Disabilities (LPD) Section Meeting,

CARL Member Transitions

Constantia Constantinou began as University Chief Librarian at the University of Toronto and Dale Askey began as University Librarian on September 1, 2026.

Staff

The current general division of responsibilities is:

- *Michael Vandenburg – 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)

- *Amanda Wheatley – VPO, AI and Library Strategies* (January 2026 – January 2027)
- *Susan Cleyle – VPO, Leadership Development Initiatives* (September 2021 - September 2026)
- *Mark Swartz – VPO, Open Science* (November 2024 – November 2026)
- *Rowena Johnson – VPO, Digital Access Policy* (September 2024 – September 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)
- *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
Report dated September 4, delivered to the Board on September 11, 2026