

20
23

ANNUAL REPORT

Bennett Library
Simon Fraser University
Photo credit: SFU Library



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MESSAGE FROM THE PRESIDENT



As we reflect on the accomplishments of the past year, I am proud to present CARL's Annual Report for 2023. This document encapsulates our collective efforts, achievements, and milestones, showcasing the leadership, dedication and resilience of our association and our members.

Our membership includes 29 of the largest university libraries in Canada, as well as two national libraries. Our strategic focus for 2022-2025 guides our efforts to advance research, learning, and innovation across Canada's academic landscape. With a commitment to collaboration, advocacy, and excellence, we strive to shape the future of research libraries, nationally and internationally.

I extend my deepest gratitude to our dedicated CARL team, members, board of directors, committee chairs, and community partners for their unwavering support and commitment.

– Brett Waytuck, CARL President

EXECUTIVE DIRECTOR'S MESSAGE

Throughout 2023, CARL experienced significant growth and transition. We welcomed two new staff members and two visiting program officers, each bringing unique skills and perspectives that enrich our organization. CARL now operates on a virtual basis and recognizing that even Ottawa-based staff choose to work primarily from home, the CARL office downsized, relocating to the MacOdrum Library at Carleton University. When I go to the office, I love being on campus and among students in a dynamic library setting!

CARL remained actively engaged in advocacy efforts and pan-Canadian discussions pertaining to copyright, generative artificial intelligence, open science, and increased support for programs that advance higher education and research, and libraries' roles within them. Many – but certainly not all – of CARL's initiatives and accomplishments are captured in this report, so please, read on!

– Susan Haigh, CARL Executive Director





CARL Board. Left to right: Amber Lannon, Michael Vandenburg, Lisa O'Hara, Mary-Jo Romaniuk, Stéphanie Gagnon, Brett Waytuck. With Susan Haigh, Executive Director. Taken at the 2023 CARL Spring General Meeting.

President

Brett Waytuck (Regina – 2023-2025)

Vice-President

Dr. Mary-Jo Romaniuk (Calgary – 2023-2025)

Treasurer, Ontario Region Representative

Amber Lannon (Carleton – 2022-2024)

Secretary, Québec Region Representative

Stéphanie Gagnon (Montréal – 2023-2025)

Director, Atlantic Region Representative

Michael Vandenburg (Dalhousie – 2023-2025)

Director, Western Region Representative

Lisa O'Hara (Manitoba – 2023-2024)

Executive Director

Susan Haigh (ex officio – non-voting)

OUR BOARD

University Libraries

Brock University

Carleton University

Concordia University

Dalhousie University

McGill University

McMaster University

Memorial University

Queen's University

Simon Fraser University

Toronto Metropolitan University

Université de Montréal

Université du Québec à Montréal

Université de Sherbrooke

Université Laval

University of Alberta

University of British Columbia

University of Calgary

University of Guelph

University of Manitoba

University of New Brunswick

University of Ottawa

University of Regina

University of Saskatchewan

University of Toronto

University of Victoria

University of Waterloo

University of Windsor

Western University

York University

Federal Institutions*

Library and Archives Canada

National Research Council Canada's National Science Library

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

Advancing Research Committee

Chair: Talia Chung (Ottawa)

Advancing Teaching & Learning Committee* *NEW!*

Chair: Amber Lannon (Carleton)

Impact Committee

Chair: Mary-Jo Romaniuk (Calgary)

Policy and Advocacy Committee

Chair: Susan Parker (British Columbia)

Strengthening Capacity Committee

Chair: Melissa Just (Saskatchewan - to October 2023)

Chair: Mark Asberg (Queen's - from October 2023)

*The Advancing Teaching and Learning Committee (ATLC) was established in 2023 to ensure closer alignment with our 2022-2025 strategic focus.



Photo credit: Phoebe Chan
UBC Library Communications and Marketing

COMMITTEE HIGHLIGHTS

ADVANCING RESEARCH COMMITTEE

Under the leadership of Talia Chung (Ottawa), the Advancing Research Committee (ARC) continued its support of CARL's Strategic Mission, achieving the following:

Developed a framework, with the NSRI and the Shared Repository Infrastructure Advisory Committee, for a national institutional repository service, hosted by Scholars Portal, leading to an MOU signed with OCUL and University of Toronto Libraries.

Conducted a **CARL Knowledge Synthesis Needs Assessment Survey** with 137 responses.

Established new communities of practice, including the Canadian Bibliometrics and Research Impact CoP, the Canadian Repositories CoP, and the Library Publishing Community Engagement Team.

Published **Open Scholarship: A Canadian Research and Academic Library Action Plan to 2025** in collaboration with CRKN. Advanced our commitment to open access through an informal stakeholder group chaired by Kathleen Shearer, involving SSHRC, NSERC, CIHR, CFI, FRQ, CFHSS, the Office of the Chief Science Advisor, Federal Science Libraries Consortium, University of Toronto, CRKN, and CARL.

Conducted a review of Canadian content in OpenAIRE and other discovery services and developed good practice recommendations to improve its visibility.

Susan Haigh was elected chair of SCOSS, and Amy Buckland (Concordia) was named to the Coalition Publica Advisory Committee.

Published **Observations on Research Libraries' Alignment with Institutional STEM Priorities**, a collaborative exploration with ARL.

ADVANCING TEACHING & LEARNING COMMITTEE

CARL's newest strategic committee, Advancing Teaching and Learning, has succeeded in advancing several initiatives with Amber Lannon (Carleton) as chair:

Hosted the **Francophone OER Summit** at the University of Ottawa in April, convening over 30 francophone student leaders, faculty members, librarians, and open education experts to discuss and develop OER-related advocacy directed at the federal government.

Completed the function-based Generative Artificial Intelligence: A brief primer for CARL Directors, an ATLC initiative.

Released the **National Advocacy Framework for Open Educational Resources** in Canada in May, advancing advocacy efforts in the field.

Organized a webinar on **Introducing the Open Education Leadership Essentials Workshop-in-a-Box** by the Open Education Working Group.

Established two new working groups: the Digital Fluency Task Group to adapt a Digital Literacy Framework for the Canadian context, and the AI Task Group to consider the impact of AI on teaching and learning in the Canadian academic library context.

Hosted four community calls as part of the **Open Education Cross-Canada Coffee Chat** series.

STRENGTHENING CAPACITY COMMITTEE

Under the leadership of Melissa Just (Saskatchewan - to October 2023) and Mark Asberg (Queen's - from October 2023), the Strengthening Capacity Committee (SCC) worked toward the long-term support of librarian research, workforce development and renewal, strategic recruitment, leadership and management development, and equity, diversity, and inclusion. 2023 initiatives included:

Partnered with the University of Victoria Libraries to host **Evidence Synthesis Institute Canada 2023**, held virtually from April 17 - 20, with 50 participants successfully completing the program.

Held a successful **Librarians Research Institute** jointly hosted by Carleton University and the University of Ottawa from June 12-15, and welcoming 29 participants.

Organized several professional development opportunities for CARL member library directors, led by Susan Cleyle, Visiting Program Officer for Leadership Development Initiatives.

Administered the 2023 cycle of CARL's Research in Librarianship Grant (see recipients on page 16).

Continued the Equity Diversity and Inclusion Working Group's series of inclusion perspectives webinars under the leadership of working group Chair Selinda Berg (Windsor), and CARL Visiting Program Officer for Equity Diversity and Inclusion, Aditi Gupta (Victoria). Panels featured library colleagues from the 2SLGBTIAQ+ community and library colleagues with intersectional identities.

IMPACT COMMITTEE

Under the leadership of Mary-Jo Romaniuk (Calgary), CARL continued to support assessment within and across Canadian research libraries. 2023 initiatives included:

Provided training on the Library Impact Framework, including a practitioner session at CLAW 2023 and presentations at several member libraries.

Continued development of a modernized survey tool and database to enhance users' experience submitting and manipulating data as part of the CARL Statistics program.

Led by Sharon Murphy (Alberta), the Continuing Education Working Group planned the **Canadian Library Assessment Workshop** hosted by Western Libraries from October 23-25, with 66 participants in attendance.



MEMBER STATISTICS

2021 -
2022

4767

total full time
staff equivalent

16,503

total
presentations
to groups

82%

of academic
members have
dedicated RDM
staff

93%

of all materials
are electronic

467.7K

total reference
interactions

512

total open
access journals
hosted

\$10.4M

spent to
support open
access

\$363.7M

spent on
materials

POLICY & ADVOCACY COMMITTEE

Under the direction of Susan Parker (British Columbia), CARL continues to adhere to public policies that foster research and innovation. 2023 initiatives included:

Lobbying and Other Activities

Met with government officials and MPs to discuss legislative and regulatory issues related to copyright, privacy, accessibility, and open educational resources, as well as topics related to WIPO and the Standing Committee on Copyright and Related Rights (SCCR).

Presented findings on cross-border exchange of accessible format books at WIPO & SCCR, raising questions with Canadian government representatives, and continue discussions on related copyright issues.

Issued a communiqué in August to address misrepresentation of educational copying in media coverage, particularly focusing on fair dealing and classroom material use.

Launched the **Fair Dealing Works campaign** during 2023 Fair Dealing Week, advocating for maintaining educational fair dealing provisions in Canada's Copyright Act, emphasizing the balance it maintains between creators and users.

Published **Controlled Digital Lending of Library Books in Canada** in The Partnership Journal, exploring legal considerations and practical guidance for Canadian libraries, adapted from a whitepaper by D. R. Hansen and K. K. Courtney.

Released a FAQ document in February 2023 to assist Canadian librarians in navigating amendments to the Copyright Act, specifically addressing the extension of copyright protection from 50 to 70 years after the author's death, effective December 30, 2022.

POLICY & ADVOCACY COMMITTEE

House of Commons Activities

Monitored and engaged with House of Commons activities, including the tabling of the 2023 Federal Budget, which proposed investments supporting the right to repair, targeted funding for post-secondary education among Indigenous peoples, minority language education, and addressing barriers faced by persons with disabilities.

Noted the passing of Bill C-18, the Online News Act, and the adoption of Private Member's Bill C-244, aimed at amending the Copyright Act to address diagnosis, maintenance, and repair issues.

Tracked the House's decision to make hybrid sittings permanent and observed changes resulting from a cabinet shuffle, including shifts in key portfolios related to copyright.



STAFF MOVEMENTS

NEW in 2023

Our team welcomed new staff members and VPOs in 2023.

CARL Staff:

Elizabeth Kalbfleisch - Project Officer (April 2023 - ongoing)

Graham Lavender - Project Officer (April - September 2023)

Visiting Program Officers (VPOs):

Aditi Gupta - VPO, Equity, Diversity, Inclusion

Gabriela Mircea - VPO, Metadata and CARL Collaboration with OpenAIRE

A special thanks to...

A heartfelt thank you to the VPOs, whose work with CARL concluded in 2023, for their expertise, talents, and dedication to a wide range of important areas of our work.

Pascal Calarco

VPO, Marrakesh Treaty
Implementation
(Windsor - July 2021 - June 2023)

Ravit David

VPO, Copyright
(Toronto - Sept 2022 - Sept 2023)

Corey Davis

VPO, Digital Preservation
(Victoria - April 2020 - March 2023)

Victoria Ho

VPO, Equity, Diversity, and Inclusion
(Manitoba - Feb 2022 - Jan 2023)

Victoria Owen

VPO, Marrakesh Treaty
Implementation
(Toronto - July 2020 - June 2023)

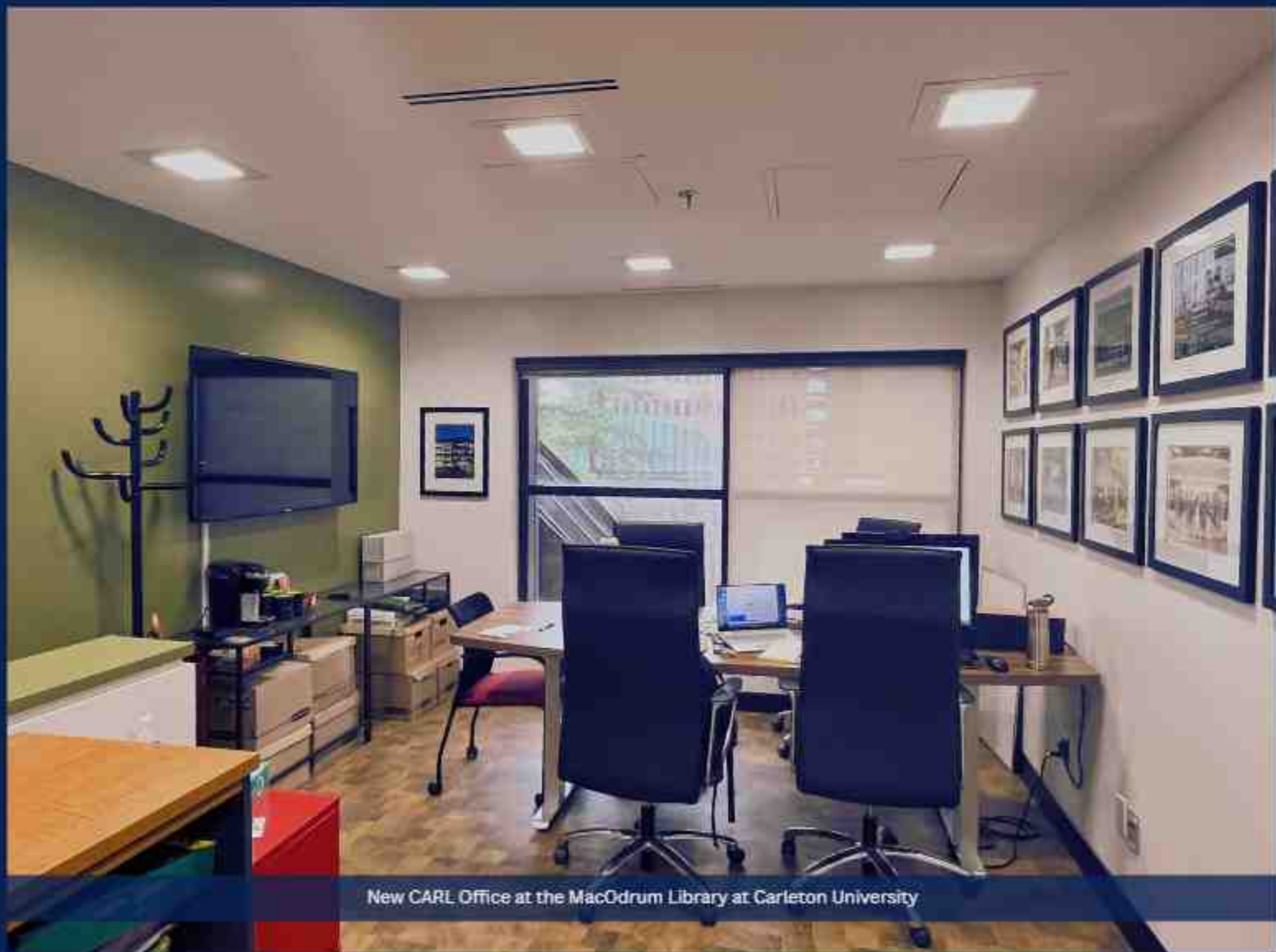
Karen Nicholson

VPO, Teaching and Learning
(Guelph - April 2023 - Oct 2023)

OUR NEW HEADQUARTERS

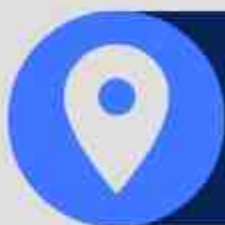
In 2023, we moved!

CARL relocated its office to the MacOdrum Library at Carleton University. We are grateful for the renovations completed in the space before our arrival and the assistance provided as we settled in.



New CARL Office at the MacOdrum Library at Carleton University

SPRING GENERAL MEETING



CALGARY, ALBERTA

May 29 -
June 1

The Spring General Meeting took place at the Marriott Downtown Hotel in Calgary, Alberta, from May 29 to June 1st. Alongside the standard Board and Committee meetings, an array of engaging program sessions were featured, centering on two focal themes: *Digital Shift & Implications of AI for Research Libraries* and *Collaborations & Impact*. Notable sessions included discussions on Machine Learning and Research Libraries: Implications and Actions, the Joint Open Scholarship Action Plan, and Controlled Access Management for Research Data.

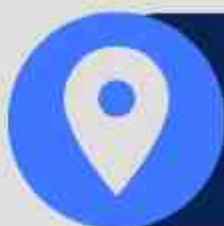


CARL dinner at the Skybridge Studio Bell National Music Centre, Calgary.



CARL staff. Left to right: Katherine McColgan, Julie Morin, Kasia Kozyma-Kocikowska, Elizabeth Kalbfleisch, and Graham Lavender.

FALL GENERAL MEETING



MONTEBELLO, QUÉBEC

**Nov 27 -
Nov 30**

CARL member library directors came together in Montebello for the 2023 CARL Fall Meeting. In addition to CARL Board and Committee meetings and the business meeting, the program included the following sessions: Marrakesh Treaty Final Report and Toward an Accessibility Library Framework for Canada; Open Access developments and priorities: Sustainable Infrastructure, Sustaining Infrastructure: What's Next for Canada?; and Progress on Respectful Description: Ontologies and Platforms.



CARL AWARD FOR DISTINGUISHED SERVICE TO RESEARCH LIBRARIANSHIP

Joy Kirchner



Left to Right: Gwen Bird (SFU), Joy Kirchner (York), Tina Brown & Chris Burghardt (ProQuest, Part of Clarivate)

CARL honoured **Joy Kirchner**, Dean of Libraries at York University, with the CARL Award for Distinguished Service to Research Librarianship during its Annual General Meeting in Spring.

This award is conferred annually to a Canadian individual who has served the profession with marked distinction and has made significant national and international contributions to research librarianship through their leadership and engagement.

CARL is grateful to **ProQuest, Part of Clarivate** for its generous support of this award.

RESEARCH IN LIBRARIANSHIP GRANT

The Research in Librarianship Grant was designed to assist librarians' active engagement in research activities. It is intended to support projects involving structured, evidence-based research, which propose answers to real-world issues.

2023 RECIPIENTS

Embedding Information Literacy & Community-Engaged Research into Science Curricula —
Abeer Siddiqui (McMaster University)

Health Sciences Librarians' Attitudes and Behaviours Regarding the Documentation and Sharing of Knowledge Synthesis Search Strategies —
Heather Cunningham & Julia Martyniuk (University of Toronto), Jill Boruff, Sabine Calleja, & Alisa Beth Rod (McGill University), Ani Orchanian-Cheff (University Health Network), Alix Pincivy (Centre hospitalier universitaire Sainte-Justine), and Daniela Ziegler (Centre hospitalier de l'Université de Montréal).

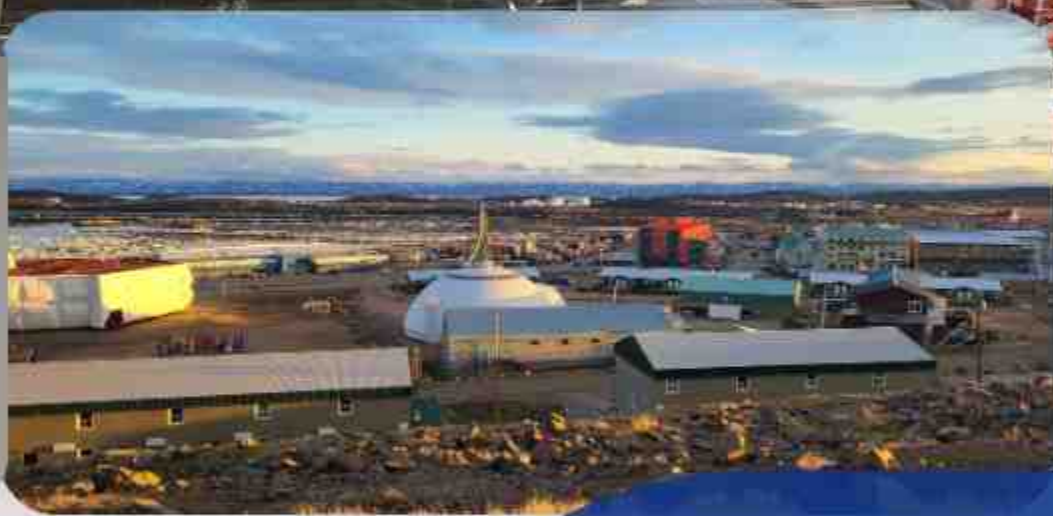


STUDY DELEGATION TO THE NORTH

June 25 - July 6

Northern Territorial Capitals

Stop 1: Iqaluit, Nunavut



16 representatives from CARL member institutions, along with two CARL staff, visited the three Northern territorial capitals and met with 78 individuals from 30 different organizations.

STUDY DELEGATION TO THE NORTH

June 25 - July 6

Northern Territorial Capitals

Stop 2: Yellowknife, Northwest Territories



The tour objective was to increase understanding and appreciation of Canada's North, its Indigenous and non-Indigenous populations, regional cultures, and varied geographies.



STUDY DELEGATION TO THE NORTH

June 25 - July 6

Northern Territorial Capitals

Stop 3: Whitehorse, Yukon



It became evident that there isn't just ONE North, but rather many distinct Norths. Nunavut, the Northwest Territories, and Yukon are each at varying stages of economic, social, and governmental development.



LIBRARIANS' RESEARCH INSTITUTE

 **June 12-15, 2023**
Carleton University and University of Ottawa

After a hiatus since 2018, the LRI, a four-day intensive workshop, provided **29 academic librarians** from across Canada with an opportunity to immerse themselves in sustained conversations and activities related to scholarly research, inquiry, and publishing.



Librarians' Research Institute 2023 at Carleton University and University of Ottawa



Librarians' Research Institute 2023 at Carleton University and University of Ottawa

CANADIAN LIBRARY ASSESSMENT WORKSHOP

October 23 – 25, 2023
Western University



This year's CLAW focused on assessment in a time of change amid social disruptions like the COVID-19 pandemic. The event aimed to enhance assessment practices for research libraries. **66 participants**, including both new practitioners and experienced professionals, benefited from effective methods, tools, and techniques shared during the program.



Canadian Library Assessment Workshop 2023 at Western University

SUPPORTING OUR MEMBERS



Director's Zoom Gatherings

Bi-weekly and informal, these Zoom gatherings for CARL directors provided a platform to unite, share insights, and inspire one another.



Webinars and Community Calls

CARL hosted regular webinars and community calls, catering to diverse library communities, free and accessible to all - members and non-members alike. Explore the full list [on the CARL website](#).

COMMUNICATIONS

Regular Outreach



CARL continued to publish its **weekly *E-lert* bulletin** and the number of subscribers increased from 1326 to **1417** this year.



CARL actively engaged with the library research community through regular updates and interactions on **X** (formerly Twitter), fostering dialogue, sharing resources, and promoting collaboration.

Reports and Publications

- [Generative Artificial Intelligence – A Brief Primer for CARL Institutions](#)
- [Francophone OER Summit Report](#)
- [Final Report on the ARL/CARL Task Force on Marrakesh Treaty Implementation](#)
- [Towards Open Scholarship: A Canadian Research and Academic Library Action Plan to 2025](#)
- [Observations on Research Libraries' Alignment with Institutional STEM Priorities](#)
- [Frequently Asked Questions About Term Extension for Authored Works](#)

Responses to National Issues and Position Statements

- [CARL response to the Consultation on Copyright in the Age of Generative AI](#)
- [CARL Responds to Recent Media Coverage on Educational Copying](#)
- [Letter to Minister Rodriguez on the Canadian Museum Policy renewal](#)
- [Joint Brief on the Ontario Government Consultation Paper on Modernizing the Consumer Protection Act, 2002](#)

Responses to Federal Budget

- [CARL submission to Pre-Budget consultations 2024](#)
- [CARL submission to the Department of Finance Canada Pre-Budget Consultations 2023](#)

FINANCIAL SUMMARY



STATEMENT OF FINANCIAL POSITION AS AT DECEMBER 31, 2023

L'ÉTAT DE LA SITUATION FINANCIÈRE AU 31 DÉCEMBRE 2023

Current assets	253,558	Actif à court terme
Investments	650,542	Placements
	904,100	
Current liabilities	162,574	Passif à court terme
Restricted and unrestricted assets	741,526	Actifs affectés et non affectés
	904,100	

REVENUE

Operating

Membership fees	845,446
Other revenues	67,036

Strategic Programs

Membership fees	74,541
Other revenues	372,026

Total revenue	1,359,049
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REVENUS

Fonctionnement

Cotisations
Revenus divers

Programmes stratégiques

Cotisations
Revenus divers

Revenu total

EXPENDITURES

Operating

Salaries and benefits	637,720
Meetings	84,647
Other operating	185,734

Strategic programs	519,218
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Total Expenditures	1,427,319
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DÉPENSES

Fonctionnement

Salaires et avantages sociaux
Réunions
Fonctionnement divers

Programmes stratégiques

Dépenses total

Net revenue (expenditure)	(68,270)	Revenus (dépenses) nets
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THE CARL TEAM



Susan Haigh
Executive Director



Katherine McColgan
Manager,
Administration and
Programs



Julie Morin
Senior Program
Officer



Katarzyna (Kasia)
Kozyra-Kocikowska
Administrative Officer
& Event Coordinator



Graham Lavender
Project Officer



Elizabeth Kalbfleisch
Project Officer



Karen Nicholson
Senior Program
Officer



Kathleen Shearer
Research Associate



Geoff Harder
Director, National Shared
Repository Infrastructure
(Alberta)

VISITING PROGRAM OFFICERS



Susan Cleyle
VPO - Leadership
Development
Initiatives (Memorial)



Rowena Johnson
VPO - Digital Access
Policy (Calgary)



Ann Ludbrook
VPO - Open
Education (Ryerson)



Victoria Ho
VPO - Equity, Diversity,
and Inclusion (Manitoba)



Amanda Wakaruk
VPO - Copyright
(Alberta)



Ravit David
VPO - Copyright
(Toronto)



Aditi Gupta
VPO - Equity, Diversity
and Inclusion
(Victoria)



Gabriela Mircea
VPO - Metadata & CARL
Collaboration with
OpenAire (Calgary)



Corey Davis
VPO - Digital
Preservation (Victoria)



Victoria Owen
VPO - Marrakesh
Treaty Implementation
(Toronto)



Pascal Calarco
VPO - Marrakesh Treaty
Implementation
(Windsor)



Karen Nicholson
VPO - Teaching and
Learning (Guelph)