TRIANGLE RESEARCH LIBRARIES NETWORK

Annual Report
2016-2017

Triangle Research Libraries Network (TRLN)

Duke University | North Carolina Central University |
North Carolina State University | The University of North Carolina at Chapel Hill

TRLN's purpose is to marshal the financial, human, and information resources of members' research libraries through cooperative efforts in order to create a rich and unparalleled knowledge environment that furthers the universities' teaching, research, and service missions.

www.TRLN.org

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From the Executive Director
Lisa Croucher

Rita Dove, a poet and essayist who served as Poet Laureate Consultant in Poetry to the Library of Congress, once said, "In the process of revision, I discover things." The 2016 - 2017 fiscal year was one of revision and discovery for TRLN -- of its priorities, its approaches to collaboration, its space, and its leadership.

Priorities - The 2016 Annual Meeting, held in July, resulted in the creation of one new committee, four new task groups, one new activity, and re-commitment to two existing projects, all of which are presented throughout this report. While each of these endeavors is within the broad scope of *TRLN United*, the program plan developed in 2010, we discovered that it is time to review and possibly revise our priorities to ensure that they reflect both traditional and emerging fields of academic librarianship.

Collaboration - The TRLN Discovery project, launched to develop a new shared discovery service to replace Search TRLN, inspired us to explore new ways of working together. We adopted an agile approach to this project and supported training of key personnel to serve as product owners at each institution. TRLN Direct, our unmediated borrowing program, also presented opportunities to revise our approach to interinstitutional collaboration. Online tools like Slack, CORAL, Jira, GitHub, Google Groups, and the AWS cloud are transforming the way we communicate and collaborate.

Space - While those tools have become central to our work, we also have discovered the value of physical space and colocation. The Frontier, a collaborative work environment in Research Triangle Park, has served as convenient, affordable, and accessible space for committee and council meetings. Perhaps more importantly, we increasingly notice people from TRLN libraries using the space for their own meetings and events. TRLN central staff also benefited this year from a redecorated office space in UNC's Wilson Library.

Leadership - Finally and most notably, during this fiscal year two of our University Librarians (half of our Executive Committee) announced their retirements after illustrious careers at our member institutions. Sarah Michalak had served as the University Librarian and Associate Provost for University Libraries at The University of North Carolina at Chapel Hill since 2004. Susan Nutter had been the Vice Provost and Director of the NCSU Libraries since 1987. Carol Hunter and Greg Raschke were named to serve in interim positions for Sarah and Susan, respectively. Given Sarah's and Susan's enduring and influential leadership of TRLN, the consortium will certainly discover a revised identity upon their departure.

In the coming year, we will continue to harness the extraordinary talent and other resources of TRLN libraries through continued and reflexive revision and discovery.

Strategic Plan Word Clouds

These word clouds are visual summaries of each TRLN member library's strategic plan, revealing thought-provoking areas of overlap as well as unique areas of focus.

Duke University Libraries

NCCU Shepard Library

NCSU Libraries

UNC Libraries

Ford Library at the Fuqua School of Business (Duke)

Medical Center Library (Duke)

School of Law Library (NCCU)

Kathrine R. Everett Law Library (UNC)

Created by Tessa Palmer, a UNC work study student who supported the TRLN central office throughout 2016 - 2017.

Selected Accomplishments

Duke

• The **Duke Forward fundraising campaign** concluded on June 30, raising $3.85 billion for strategic priorities across the university. The libraries raised almost $64 million—142 percent of their goal.

• Completed a feasibility study and draft case statement for **modernization of Lilly Library.**

• Formed the **Diversity, Equity, and Inclusion Council (DivE-In)**, which organizes education and training sessions, hosts webinars, recommends staff readings, and promotes Duke events that address diversity, equity, and inclusion issues.

• Launched a new **Adopt a Digital Collection Program** to support the costs of long-term digital preservation.

• Added two senior research data management consultants and two digital repository content analysts to support the complete research lifecycle and help researchers comply with new **data management** mandates.

NCCU

• Renovated the second floor of **James E. Shepard Memorial Library**, consolidated Research and Instruction Services and Information Technology Services into a single service point, created a new Access Services desk, and opened two new collaborative spaces on the second floor.

• **Law Library facility upgrades** expanded study space and printing services for students. Twenty-nine new study carrels, two standing computer tables, Connectrac wiring, and new carpet were installed in the summer of 2017.

• Sponsored an **Open Educational Resources Lunch & Learn** for faculty. Librarians are collaborating with four criminal justice faculty to develop Open Educational Resources classes.

• Library staff are featured in **recent or upcoming publications**. Coordinator of University Archives and Instructor of Public History Andre D. Vann's book <u>African Americans of Durham County</u> was published by Arcadia Publishers. Librarians Danielle Colbert-Lewis, Jamillah Scott-Branch, and Vernice Faison's chapter "Orchestrating Collaborations: A Systematic Approach to Gaining Campus Allies" will be included in <u>The Relevant Library: Essays on Adapting to Changing Needs</u> (2018, McFarland & Company Publishers).

NCSU

- Received a $414,000 grant from the Andrew W. Mellon Foundation to support the project **"Visualizing Digital Scholarship in Libraries and Learning Spaces,"** which continues the libraries' pioneering work with large-scale research visualization technologies.
- As part of a multidisciplinary team led by researchers at the University of Pittsburgh, received a $97,911 grant from the Institute of Museum and Library Services (IMLS) through its Laura Bush 21st Century Librarian Program. **"The Data Scientist as the 21st Century Librarian?"** provides recommendations about the data-science skills that librarians need and builds model data science training for research librarians.
- Held the third **Data Science and Visualization Institute for Librarians**, a customized training curriculum for librarians working to add value across the research enterprise.
- Joined the **Open Textbook Network** and received $49,958 from the IMLS National Leadership Grants for Libraries Program for the Open Textbook Toolkit. This project explores the need for and ideal components of a subject-specific, simple, flexible, and scalable "toolkit" for creating open textbooks and educational resources.
- Received a $35,000 Pentair Foundation grant to support **STEM programming and instruction for underrepresented groups** at NCSU. The grant established a new Pentair Fellows program through which graduate students develop and teach free workshops on STEM tools and technologies. The grant also sponsors the libraries' Making Space series of events advocating for women in STEM fields.

UNC

- **Sarah Michalak** retired as University Librarian on December 31, 2016 after serving in that position since 2004. Carol Hunter was named Interim University Librarian while an official search was conducted to fill the position.
- UNC's Provost designated funding to help the library advance and develop infrastructure to support open access, including the **Carolina Digital Repository**. Three new positions—an institutional repository librarian, an open access librarian, and a software developer—were created to work on this priority.
- Received a Library Services and Technology Act (LSTA) grant of $463,403, which allows the **North Carolina Digital Center** to continue preserving and making local history available online. Launched in 2009, this project now involves 224 libraries, archives, museums, and historical centers across the state.
- **Kathrine R. Everett Law Library** librarians taught nine courses in the UNC School of Law, including Advanced Legal Research, a Privacy Law Seminar, Law Practice Technologies, and Introduction to the Law of the U.S. for foreign exchange students.

Library Staff Professional Development

During 2016-2017 TRLN was pleased to support several training opportunities for member library staff who serve on councils, committees, or task groups, and/or who develop or maintain the key software tools that facilitate a shared collection.

TriAgile Conference
Luke Aeschleman (UNC)
Emily Daly (Duke)
Ayse Durmaz (Duke)
Sydney Thompson (NCSU)

Certified Scrum Product Owner Training by Winnow Management
Emily Daly (Duke)
Chad Haefele (UNC)
Emily Lynema (NCSU)

Blacklight Summit
Luke Aeschleman (UNC)

ALA Midwinter: Relais D2D User Group Meeting
Sydney Thompson (NCSU)

Annual Meeting

The 2016 Annual Meeting was a day focused on setting TRLN's priorities for the next year. Members gathered at the Friday Center in Chapel Hill on July 14 to hear updates on existing and emerging TRLN collaborations and a keynote address by Katherine Skinner, Executive Director of the Educopia Institute. North Carolina author Krista Bremer delivered lunchtime remarks and a reading from one of her books.

The morning Priority Setting Discussions generated significant creative and strategic momentum. Attendees proposed and discussed recommendations for TRLN's councils and governing bodies to consider when setting consortial priorities for the coming years.

Management Academy

TRLN hosted its 7th Management Academy from October 3-7, 2016 in Chapel Hill. This year's applicants represented 31 different institutions, including 17 who had not previously applied. In the end, the Academy Steering Committee accepted 32 participants representing 21 institutions.

The Academy is intended for library professionals recently appointed to management responsibilities. The curriculum equips them with business and human resource management principles that will help them flourish in their roles. The 2016 class found the material directly relevant to their daily roles and challenges, as several participant quotes indicated:

"I am already applying what I learned about communication and building trust."
"Returning from the Academy, I used 3 specific [takeaways] in my first week. Things are already better in terms of working inside my environment, and I credit a lot of that to the Academy."

Fellows Reception

On February 1, 2017, the hard work and many accomplishments of TRLN member libraries' fellows, graduate students, interns, graduate assistants, library associates, and Carolina Academic Library Associates (CALA) were celebrated in a special reception at the Rizzo Center in Chapel Hill. Remarks were given by Meggan Farish, Doctoral candidate at Duke; Lillian Rigling, Library Fellow at NCSU; Jessica Serroa, Library Associate at NCSU; and Alena Principato, CALA at UNC. Congratulations to all of the honorees and their mentors!

Other Meetings and Events

TRLN hosted several meetings and events that allowed members to engage with the collaborative potential of the consortium, and with resources that are available to meet potential needs.

October 27, 2016: Hinari Programme Workshop
Together with UNC librarians Mary White and Brenda Linares, and Duke librarian Megan Von Isenburg, TRLN co-hosted a workshop on using the Hinari Access to Health Research Programme. This online resource enables researchers in low- and middle-income countries to access an extensive collection of biomedical and health literature. Lenny Rhine, Ph.D., of Librarians without Borders and the Medical Library Association, led the workshop for librarians, students, and faculty with an interest in global health. Participants qualified to earn four continuing education credits for their participation.

January 23, 2017: DuraSpace and DPN
Debra Hanken Kurtz, CEO of DuraSpace, and Dave Pcolar, CTO of Digital Preservation Network (DPN), presented TRLN members with an overview of the DuraCloud digital preservation service. Attendees discussed the various preservation needs on individual TRLN campuses as well as possible opportunities for collaborative digital preservation.

January 26, 2017: EBSCO
EBSCO representatives Neil Block, Vice President of Open Source Innovation; Steve O'Dell, Vice President of Sales; Steve Strother, Director of Southeast Sales; and Zach O'Dell, Regional Sales Manager, met with TRLN technology and technical services representatives for an information sharing meeting. TRLN members provided an overview of the consortium's current priorities and activities (including the shared discovery project, unmediated borrowing, and potential areas of collaboration). The EBSCO team then shared information about resources including EBSCO Discovery Service (EDS) and the open source LSP initiative FOLIO.

April 21, 2017: TRLN Orientation
TRLN welcomed twelve new employees of member libraries to an orientation to the consortium, held at The Frontier. The program allowed members to meet counterparts from other institutions, learn about TRLN, and brainstorm collaborative opportunities.

Diversity and Inclusion Committee

The Human Resources Council decided in Fall 2016 to establish a committee on Diversity and Inclusion, formalizing the activity of an interest group that had been meeting regularly on this topic of increasing importance to libraries. The committee is charged with coordinating activities related to diversity and inclusion. It will provide opportunities for discussion and exploration of issues relating to recruiting and retaining a diverse workforce, creating an inclusive environment for patrons and library staff, and addressing diversity and inclusion issues as they relate to services to library users and researchers. The committee will share information among the individual libraries' Diversity Committees; plan collaborative events, workshops, and lectures; and communicate relevant information to staff at all of the libraries at their institutions.

New Task Groups

Responding to the momentum generated by the 2016 Annual Meeting, TRLN's four programmatic councils proposed to the Executive Committee new task groups that would facilitate collaboration in emerging areas. At its December meeting, the Executive Committee approved the establishment of the following four task groups:

**1. Research Data Management and Use**
Host councils: Services, Technology
Charge: To develop recommendations for formalizing TRLN support of Research Data Management and Use. Possible approaches include establishing an interest group or committee, facilitating online communication/community, designating people to represent these areas on the Technology and/or Services Council, and/or developing and offering a series of information sessions or seminars.
Report due date: April 1, 2017

2. Technical Services
Host councils: Collections, Technology
Charge: To develop recommendations for formalizing TRLN support of technical services, broadly defined. Issues ultimately to be addressed include: Where/how does technical services "fit" in TRLN as an organization, given that it touches on all
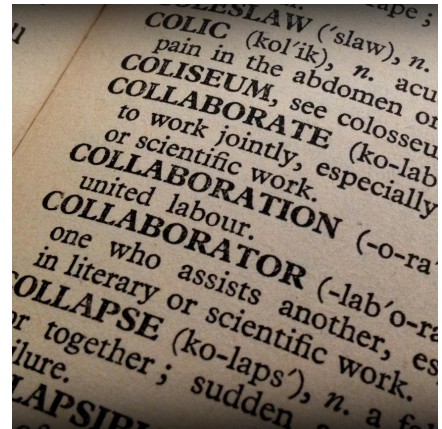
programmatic councils? How will technical services be brought in to support shared collection development? What are achievable priorities in this area? Are there emerging areas of technical services that TRLN members could pursue or advance collaboratively?

Report due date: December 31, 2017

3. Expanding Cooperative Acquisitions, Processing, and Shelving for Non-English Language Print/Tangible Resources

Host council: Collections

Charge: To improve collective support for selecting, on-boarding, and managing non-English language collections; consider opportunities to leverage dollars and staff to be able to select, acquire, and process more comprehensive non-English language collections; explore how TRLN can pool linguistic expertise to expand cataloging/processing capabilities and make collections available; and identify logical areas where TRLN can minimize duplication of non-English print/tangible resources while expanding the breadth and depth of TRLN's collective non-English collection.

Report due date: May 1, 2017

4. Analyzing Print Monographs and Expanding Their Cooperative Print Retention

Host council: Collections

Charge: To examine opportunities for print retention at a scale(s) larger than TRLN; acquire a more precise understanding of TRLN monographic collections at the level of both individual libraries and the consortium as a whole in terms of subjects, languages, and imprint dates in particular; identify areas of unique or exceptional collection strengths in monographic print holdings within TRLN; and use the resulting data to dramatically expand cooperative print retention and de-duplication/discarding to rightsize collections with less redundancy.

Report due date: June 1, 2017
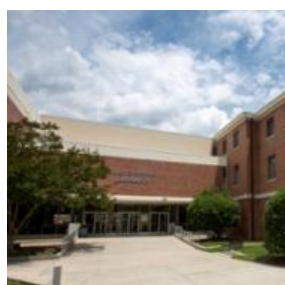
TRLN Institute

From June 26-28, 2017, six teams of TRLN librarians gathered at NCSU's James B. Hunt Library to participate in the **TRLN Institute focused on Scholarly Communication**. With support from the Collections Council, the Institute allowed teams to spend three days incubating new projects and generating clear, actionable steps toward further collaboration.

Participants found that this format created valuable momentum that can be hard to achieve when trying to collaborate across institutions. Maggie Dickson, Metadata Architect at Duke University Libraries, was a member of the group focused on the topic "Clarifying Rights and Maximizing Reuse with RightsStatements.org." Reflecting on the experience, Maggie said, "Having this much dedicated and unencumbered time to thoughtfully and intentionally address a problem area with colleagues was invaluable. And the open schedule allowed groups to be flexible as their ideas and expectations changed throughout the course of the three-day program."

Two particular groups saw significant growth stemming from their TRLN Institute interactions. One group, "Building a Research Data Community of Practice in NC," sought to catalyze the efforts of the TRLN Research Data Management and Use Task Group. By the end of the Institute this team had launched **"North Carolina Data Interest Group" (NCDIG)**, a Google Group for any North Carolina library professional interested in issues surrounding research data. NCDIG has developed a virtual community for sharing news, questions, and best practices.

The group "Supporting Scholarly Communication in Libraries Through Project Management Best Practices" has likewise continued to build on its momentum by developing a **toolkit of project management resources** for use by library professionals. Discussions are continuing throughout the consortium about developing further resources and programming to bring a project management mindset to all areas of the library.

Existing Projects

TRLN Discovery

This year the project to build a **new shared discovery service** ("TRLN Discovery") remained a top priority for the consortium, with the approach to the project and the structure of the key teams evolving significantly.

After extensive research and evaluations, the TRLN Shared Discovery Services Steering Committee recommended that the **Blacklight** open source discovery layer serve as the foundation for TRLN Discovery. The committee determined that Blacklight's modularity and extensibility would best facilitate collaborative development while also allowing local variation when necessary. The decision was made to host the initial version of the product in **Amazon Web Services (AWS) Cloud**, marking TRLN's first experience with cloud hosting.

In May 2017, at the recommendation of the Advisory Team, TRLN implemented an Agile approach, specifically **Scrum**, for the implementation phase of the project. The teams and committees that had been involved with the project up to that point were reconfigured or dissolved as necessary in order to align with Scrum principles. TRLN financial and staffing resources went into the purchase of Jira and Confluence for project management.

TRLN Discovery will be implemented in phases. Regular updates about the status of the project may be found at www.trln.org.

Unmediated Borrowing

TRLN continues to benefit from its decision to commit to the use of **Relais D2D** software for unmediated borrowing and lending across member libraries. The following table demonstrates the amount of borrowing and lending that occurred between TRLN member libraries within this reporting period and places that activity within the total borrowing and lending activity at each institution. For example, the UNC chart indicates that of all of UNC's loans to other institutions, 50.57% of them went to TRLN institutions. Of UNC's 26,840 articles and loans, 10,835 were lent to TRLN institutions. Of all the articles borrowed by UNC, 16.78% were borrowed from TRLN institutions. The numbers below represent filled requests only.

Duke-Perkins	TRLN	Total	TRLN %
Borrowing			
Articles	1,339	7,837	17.08%
Loans	8,344	22,838	36.53%
Total	9,684	30,675	31.57%
Lending			
Articles	1,007	12,694	7.93%
Loans	6,102	40,725	14.98%
Total			

NCCU-Shepard	TRLN	Total	TRLN %
Borrowing			
Articles	166	222	74.77%
Loans	344	572	60.14%
Total	510	794	64.23%
Lending			
Articles	70	84	83.33%
Loans	972	1,184	82.09%
Total	1,042	1,268	82.18%

NCSU	TRLN	Total	TRLN %
Borrowing			
Articles	464	13,004	3.57%
Loans	5,906	11,961	49.38%
Total	6,370	24,965	25.52%
Lending			
Articles	768	11,738	6.54%
Loans	3,526	6,926	50.91%
Total	4,294	18,664	23.01%

UNC-Davis	TRLN	Total	TRLN %
Borrowing			
Articles	735	4,380	16.78%
Loans	3,667	8,977	40.85%
Total	4,402	13,357	32.96%
Lending			
Articles	1,077	7,544	14.28%
Loans	9,758	19,296	50.57%
Total	10,835	26,840	40.37%

20,598,476
The number of TRLN libraries' combined holdings

TRLN Central Updates

Staff Changes

In June 2017 **Ginny Masterson** joined TRLN as Communication Specialist, replacing Kelsie Adloo following her return to the education field.

In October 2016 **Shashi Penumarthy** joined TRLN in the role of Applications Analyst. He was hired to lead the implementation of the Shared Discovery Service project.

Office Renovation

Over the spring of 2017 TRLN had the opportunity to redecorate its central office space in UNC's Wilson Library. The space has been refreshed with new paint, carpet, furniture, and brand-consistent signage. TRLN staff are enjoying an environment that looks as welcoming and collaborative as the organization it houses.

Participation and Representation

TRLN central staff traveled beyond the Triangle several times this year to build relationships and share the consortium's accomplishments with a broader audience. The following conferences provided excellent opportunities to network and learn about other consortia's approaches to common issues:

November 2016
Charleston Conference (Charleston, SC)
YBP Charleston Publisher-Librarian (Charleston, SC)

December 2016
Coalition for Networked Information: CNI (Washington, DC)

March 2017
TriAgile Conference (Raleigh, NC)

April 2017
International Coalition of Library Consortia: ICOLC (Jacksonville, FL)