



TRIANGLE RESEARCH LIBRARIES NETWORK

ANNUAL REPORT

**JULY 1, 2017 -
JUNE 30, 2018**





» Contents

» From the Executive Director.....	1
» Member Leadership Transitions.....	2
» Event Highlights.....	3
o Annual Meeting	
o Management Academy	
o HR Panels at SLIS and SILS	
o Project Management workshops	
o Data Lifecycle workshop	
o CNI Fall Membership Meeting	
» Consortial Updates.....	6
o Unmediated borrowing	
o Shared discovery service	
o Shared print monographs program	
o Oxford University Press partnership	
o Electronic Resources Committee Highlights	
» TRLN 2019-2021.....	10
» TRLN Central Office Staff.....	12

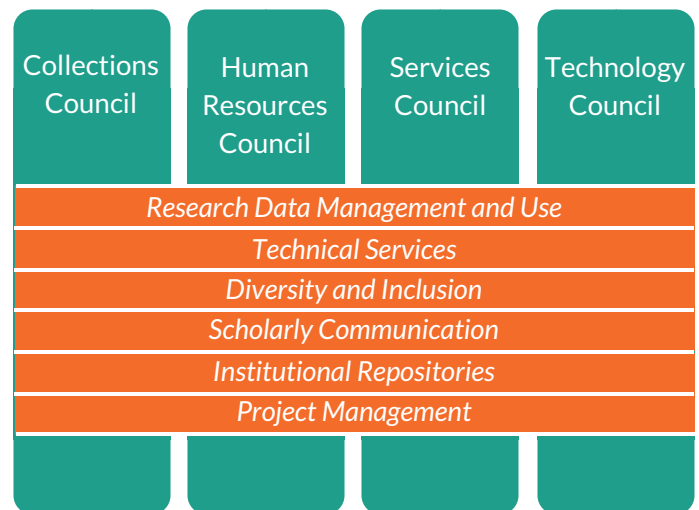
From the Executive Director

Over the past twelve months, TRLN's activities have *coalesced* around priorities that take advantage of the geographic proximity of our member institutions. Within and among various tributaries of our consortium, from Annual Meeting discussions to task group reports to informal chats over coffee, we have been engaged in strategic conversations about the role of TRLN in supporting its member libraries and the uniqueness of TRLN compared to larger regional or international collaborations in which our members participate. The priorities that have emerged include collaborative retention and sharing of **print collections**; recruitment and development of **talent**; and **effecting change** through activities conducted locally and communicated globally.

The strategic planning process unveiled the demand for a programmatic and organizational structure that more effectively supports our activities and current work context. As conveyed in the image to the right, many of the initiatives that have emerged over the past couple of years do not fit neatly into our existing programmatic structure. We therefore are implementing a **new organizational framework** in 2019 that facilitates timely and agile action in areas of utmost importance to our members.

As the strategic conversations about our role and priorities have continued, we also have made tremendous progress on core, mission-critical projects. The **TRLN Discovery project** will result in a convenient, customizable **shared discovery service** that enables users to efficiently locate and access research materials from member libraries. From one perspective, this project began in 2015, when we realized that a transition from Search TRLN, the shared catalog, was imminent due to aging systems and software. From a broader historical perspective, the project has its genesis in a 1978 consulting report that recommended the "development of a local area distributed network to provide mutual access to the three collections." (NCCU had not yet joined the consortium.) We also continue to expand and improve the **TRLN Direct project** that supports **unmediated borrowing** among our member institutions and beyond. TRLN Direct team members have become active contributors to broader external conversations about innovative approaches to cross-consortial resource sharing.

With the implementation of our new organizational structure and the launch of the new discovery layer both planned for early 2019, we anticipate more great things, and **continued coalescence**, in the year to come.



Lisa Croucher
TRLN Executive Director

Member Leadership Transitions

DUKE

Richard A. Danner, Archibald C. and Frances Fulk Rufty Research Professor of Law Emeritus at Duke Law School, passed away on February 22, 2018. Danner had retired on July 1, 2017, as Senior Associate Dean for Information Services and Director of the J. Michael Goodson Law Library after more than 35 years at Duke Law School.

On May 31, 2018, Duke announced that **Femi Cadmus** had been named the Archibald C. and Frances Fulk Rufty Research Professor of Law, Associate Dean of Information Services and Technology, and Director of Goodson Law Library.

On July 27, 2018, **Sally Kornbluth's** reappointment to the position of Provost was announced. Kornbluth became Provost in July 2014 and will serve a second five-year term beginning on July 1, 2019. Along with the Provosts of NCCU, NCSU, and UNC-Chapel Hill, Kornbluth serves on the TRLN Governing Board.

NCCU

On June 1, 2018, **Felecia McInnis Nave** became the new Provost and Vice Chancellor for Academic Affairs. Nave most recently served on the faculty and as the Director for Faculty Development and Engagement at Prairie View A&M University.

NCSU

After thirty years at NCSU, Vice Provost and Director of Libraries **Susan Nutter** retired in September 2017. She left a legacy of innovation and creative leadership, perhaps most tangibly expressed in the visionary James B. Hunt Jr. Library.

Greg Raschke was appointed to serve as Interim Vice Provost and Director of Libraries while a search for Susan's permanent replacement was launched. Before taking on this interim appointment, Raschke had served as NCSU Libraries' Associate Director for Collections and Scholarly Communications since 2004.

UNC-CHAPEL HILL

Elaine Westbrook joined UNC-Chapel Hill as its new University Librarian and Vice Provost on August 15, 2017. She most recently served as Associate University Librarian for Research at the University of Michigan in Ann Arbor.

In October 2017, the UNC-Chapel Hill libraries bid farewell to Interim University Librarian **Carol Hunter**, who retired after seven years as Deputy University Librarian and Associate University Librarian for Collections and Services. While UNC-Chapel Hill searched for a new University Librarian and Vice Provost following Sarah Michalak's retirement, Hunter filled that role in an interim capacity from January – August 2017.

Event Highlights

Annual Meeting – July 27, 2017

Nearly 300 TRLN member librarians and library staff gathered at the William and Ida Friday Center for Continuing Education in Chapel Hill for the 2017 TRLN Annual Meeting. **Chris Bourg**, Director of Libraries for MIT, delivered a timely and thought-provoking keynote address on diversity and inclusion in libraries. She presented her address virtually from MIT's campus.

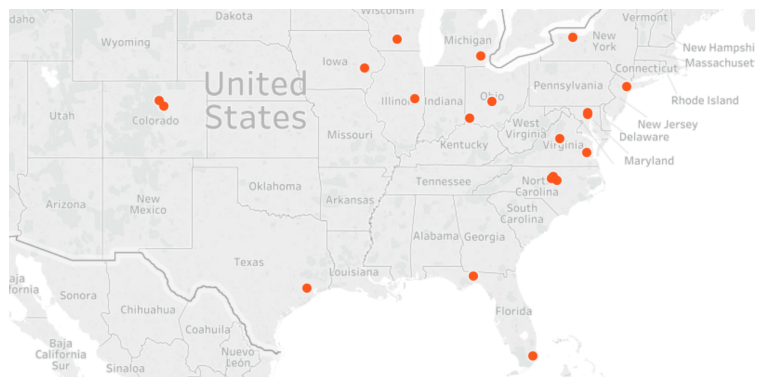
Morning sessions featured updates on various task groups and collaborative projects across TRLN. During lunch, renowned NC author **Wiley Cash** gave a reading from his upcoming novel *The Last Ballad*, discussed the true story on which it is based, and shared how libraries have aided his work.

After lunch, attendees chose one of seven Afternoon Exchanges in which to participate, having voted on potential topics throughout the morning. The day ended with optional ad hoc gatherings such as the Data Mixer hosted by the newly-formed North Carolina Data Interest Group (NCDIG).

Management Academy - April 16-20, 2018

The TRLN Management Academy is a unique experiential learning program that prepares current or new mid-level managers in academic libraries to operate with entrepreneurial and business acumen in the management of financial and human resources. The program is designed with input from library directors to support talent management and succession planning efforts by addressing gaps in the preparation of librarians for management roles.

The 2018 Management Academy cohort consisted of 34 librarians from a wide range of personal and professional backgrounds. Consultant Kathryn Deiss, a longtime adviser to the program, lent her expert facilitation skills to keep the group on schedule over the 5-day program and ensure that learning objectives were met. Topics explored through the week included: Influence and Communication (Roger Mayer, Poole College of Management, NCSU), Diversity & Organizational Culture (Fay Cobb Payton, Professor of Information Systems/Technology, NCSU), Budget & Resource Planning (Ann Elsner, Duke University Libraries, and Joe White, NCSU Libraries), Performance Management (Paul Mulvey, Poole College of Management, NCSU), and Change Management (Dick Blackburn, Kenan-Flagler Business School, UNC-Chapel Hill). Deiss led an interactive Friday morning session that synthesized key themes from the week and gave participants tools to contextualize and apply them at their home institutions.



States represented in the 2018 TRLN Management Academy cohort.

Human Resources Panels at SILS and SLIS

This year TRLN Human Resources professionals enjoyed several opportunities to advise members of the next generation of academic library professionals. Kim Burhop-Service (Director of Library Human Resources, Duke University), Doug Diesenhaus (Interim Director of Library Human Resources, UNC-Chapel Hill), Lisa Ruth (Associate Head for Recruiting and Visitor Relations, NCSU), and Jamillah Scott-Branch (Head Reference Librarian, James E. Shepard Memorial Library, NCCU) served on two panels to share career insights with students of UNC-Chapel Hill's School of Information and Library Science (SILS) and NCCU's School of Library and Information Sciences (SLIS).

On November 2, 2017, the panelists spoke during a Career Boot Camp for UNC-Chapel Hill SILS graduate students. The panelists dispelled some common job search myths and emphasized the importance of crafting an effective narrative about one's work experience. They also gave advice on transitioning into library science from other fields and on establishing a professional presence on social media platforms. On March 29, 2018, the panelists gathered again to speak with students and alumni of NCCU SLIS. They addressed topics including essential skills that employers seek in librarians; how a new graduate can stand out enough to secure a first interview; and some of the biggest challenges faced by new librarians.

TRLN looks forward to continuing to forge enriching relationships with SILS and SLIS over the next year.

Project Management Workshops

Interest in the topic of project management has been on the rise across TRLN and was initially addressed by a 2017 TRLN Institute project entitled "Supporting Scholarly Communications in Libraries through Project Management Best Practices." Members of that project team have continued to work together to equip TRLN members with project management approaches and tools.

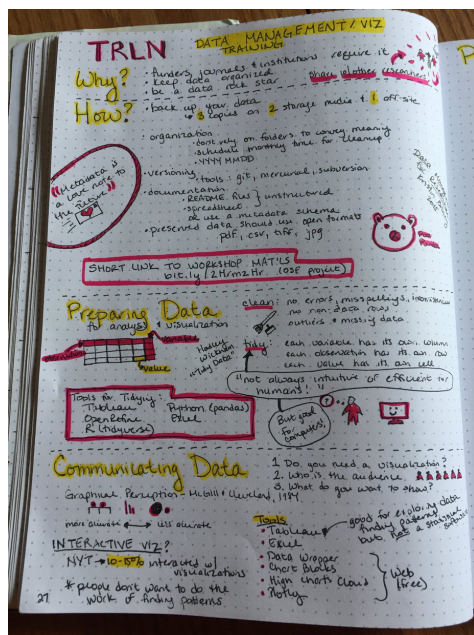
As a result of this collaboration, in May 2018 TRLN hosted a workshop entitled "**Project Management Is for Everyone.**" Developed by Jason Casden (UNC-Chapel Hill), Kim Duckett (Duke), Rebecca Miksch (NCSU), and Jennifer Solomon (UNC-Chapel Hill), the session was structured to equip people from any area of the library with a set of skills and a mindset that will help them organize and plan their work, as well as point them toward additional resources. Interest in the workshop was so high that it was offered again in June. Between the two workshops, a total of 116 TRLN member library staff participated. Additional workshops are planned for 2019.



Project Management workshop groups at work.

The project management team has continued to work together with other TRLN librarians to curate a set of resources that promote and deploy project management best practices within libraries. These can be accessed at: <https://www.trln.org/initiatives-programs/library-project-management-resources-and-tools>.

Data Lifecycle Workshop and Interest Group



UNC librarian Jennie Goforth's workshop notes.

In addition to the activities surrounding project management, another active area of collaboration this year was research data. The Research Data Management and Use Task Group II (RDMUTG II) was established this year on the recommendation of the original RDMUTG to coordinate initiatives and activities related to research data. In June 2018 RDMUTG II members hosted a workshop entitled "**Tips and Tools for the Data Lifecycle**." Developed and presented by Alison Blaine (NCSU), Lorin Bruckner (UNC-Chapel Hill), and Sophia Lafferty-Hess (Duke), the workshop provided an overview of the different stages of working with data, from data management to analysis and pre-processing to communicating results through data visualization. The 24 participants used the Tableau software to complete several hands-on activities in processing and visualizing data.

RDMUTGII also coordinates a research data community of practice in North Carolina called the **North Carolina Data**

Interest Group (NCDIG). This online discussion group is for librarians (of any subject area or discipline) and library staff in North Carolina who have an interest in research data management and use. Discussion topics include data management, data visualization, data analysis and computation, institutional repositories, GIS and mapping data, data literacy, and coding.

CNI Fall Membership Meeting

On December 12, 2017, TRLN had the opportunity to showcase the TRLN Discovery project to a wider audience at the Coalition for Networked Information (CNI) Fall Membership Meeting in Washington, DC. Lisa Croucher (Executive Director, TRLN), Ben Heet (Program Officer, TRLN), Tim McGeary (Associate University Librarian for Information Technology Services, Duke University), and Joe Williams (Interim Associate University Librarian for Collections & Services, UNC-Chapel Hill) were panelists in a session entitled, "**A Tale of Two Collaborations: Shared Discovery Through the Eyes of TRLN and BorrowDirect**." They were joined on the panel by representatives of Ivy Plus Libraries, who discussed their BorrowDirect Shared Index Project.

The panel discussed the benefits of collaboration when building a shared discovery platform; the unique challenges each consortium has encountered in the process; and their common questions and lessons learned.

Unmediated Borrowing

TRLN continues to employ Relais D2D software for unmediated borrowing and lending between member libraries. The following tables show the borrowing and lending activity that occurred between July 1, 2017, and June 30, 2018.

The statistics also show TRLN activity in the context of borrowing and lending with other, non-TRLN institutions. For instance, of the total items loaned from UNC-Chapel Hill to any other institution (17,781), 47.20% of those loans (8,393 items) were to a TRLN institution.

For the purpose of these tables, an "article" is a digital copy of an article or chapter that is retained by the borrowing institution. A "loan" is any other physical, returnable item, such as a book, DVD, or CD.

July 1, 2017 - June 30, 2018 borrowing and lending

Duke	TRLN	Total	TRLN % of Total
Borrowing			
Articles	993	6,959	14.27%
Loans	7,647	25,224	30.32%
Total	8,640	32,183	26.85%
Lending			
Articles	635	4,094	15.51%
Loans	4,889	30,027	16.28%
Total	5,524	34,121	16.19%

NCCU	TRLN	Total	TRLN % of Total
Borrowing			
Articles	210	221	95.02%
Loans	527	624	84.45%
Total	737	845	87.21%
Lending			
Articles	58	257	22.56%
Loans	106	979	10.82%
Total	164	1,236	13.26%

NCSU	TRLN	Total	TRLN % of Total
Borrowing			
Articles	231	11,853	1.95%
Loans	5,920	12,313	48.08%
Total	6,151	24,166	25.45%
Lending			
Articles	572	11,200	5.11%
Loans	3,543	6,870	51.57%
Total	4,115	18,070	22.77%

UNC	TRLN	Total	TRLN % of Total
Borrowing			
Articles	734	5,212	14.08%
Loans	3,738	12,012	31.12%
Total	4,472	17,224	25.96%
Lending			
Articles	830	5,938	13.98%
Loans	8,393	17,781	47.20%
Total	9,223	23,719	38.88%

Shared Discovery Service

Significant progress was made this year toward the successful completion of the collaborative project to develop and implement a **shared open-source discovery service** that will allow the user to conveniently find and access materials from all TRLN member libraries within a single search environment. **It is unique in uniting the catalogs of multiple independent institutions that use different Integrated Library Systems (ILS).**

The product is hosted on the Amazon Web Services (AWS) cloud computing platform. This is TRLN's first experience with cloud hosting.

A highly collaborative team of systems administrators, developers, and other stakeholders distributed across all four TRLN member institutions has worked together to refine the system. The development team follows scrum principles of project management, working in sprints and meeting in person every two weeks. Some **key tasks** completed this year included:

- A first internal release in August 2017, for local Product Owners only, deployed a skeletal version of Blacklight on top of a Solr instance hosted by AWS.
- The development team participated (along with other information technology staff from TRLN libraries) in an AWS Well-Architected Framework Session lead by an AWS Solutions Architect. The session offered advice and best practices for hosting systems on the AWS cloud computing platform.
- All four universities completed a full record load from their ILS into TRLN Discovery's Solr index in time for an August 1, 2018, internal release.
- Information sessions were held on each campus during the year to inform local user groups and library staff about how to use the new system. Several user tests were also conducted in order to gather feedback on the user experience. All feedback from these sessions and tests have helped inform system customization and improvement.

The system is due to be publicly released in January 2019. Anyone interested in regular progress updates can find them at: <https://www.trln.org/initiatives-programs/shared-discovery-services-project>.

Shared Print Monographs Program

In May 2018, the TRLN Executive Committee signed a Memorandum of Understanding (MOU) to establish a network-scale Shared Print Monographs Program. This new initiative will leverage the power of resource sharing to help member libraries:

- Build and retain collections more intentionally, preserving bibliographic diversity while avoiding redundancy in the face of budget and space constraints.

- Capitalize on long-standing relationships with one another to develop and oversee practices that are in line with national standards, thus ensuring seamless integration of our program into the emerging national network of retention programs.

The program was established in response to a formal recommendation made by the TRLN Task Group on Analyzing Print Monographs and Expanding Their Cooperative Retention, which carefully studied the landscape of retention programs and progress made by other institutions and within other regions. Based on the task group's recommendations, no more than two copies with the same OCLC number will be recorded as retention copies within the TRLN program. Materials under this program will be retained until at least January 1, 2044 (i.e., 25 full years after the execution of the MOU).

The TRLN Advisory Council will charge a Collaborative Print Monographs Working Group to oversee the terms of the MOU. The group will establish standards for, and provide guidance and support to, all TRLN monograph retention activities.

Oxford University Press Partnership

Since 2012, TRLN has partnered with Oxford University Press (OUP) and GOBI to create and maintain a **financially sustainable model for consortial acquisition of e-books**, with parallel acquisition of shared print as needed. Under the terms of the program, all four TRLN member institutions receive unlimited access to nearly the entire monographic output of OUP/UPSO content as e-books or print. They jointly acquire shared copies of print items, which reduces the number of items each individual institution must purchase and retain.

The shared print copy acquired through the program is housed at the centrally-located Library Service Center. UNC manages the circulation and lending of shared print, and Duke oversees the ingest of records for e-books.

TRLN-OUP Program Year 6 Statistics

Acquired since 2012:



20,238 print books



17,422 e-books

Downloaded since 2013:



366,666 chapters

Circulated Between July 1, 2017 - June 30, 2018



2,845 print books

1,074 circulated 1 time

758 circulated 2 times

427 circulated 3 times

586 circulated 4-18 times

Electronic Resources Committee Highlights

Springer Licensing Deal

The Electronic Resources Committee (ERC) successfully negotiated a one-year bridge license with Springer. This license extends the existing 2016-2018 deal and its accompanying agreement through 2019. In the intervening period, TRLN will determine how best to integrate Springer journals with other Springer-Nature content into a single license in 2020.

The success of this negotiation allowed TRLN to avoid a protracted licensing process that would have demanded significant time and resources from members.

Representative Cost Savings

The ERC helps TRLN member libraries maximize their resources by negotiating deals with various academic publishers. The biggest savings during this reporting period were on the following print and electronic resources:

Publisher	Resource	Savings
Springer	E-books, e-journals	73% off list price
Wiley	E-journals	43% off list price
Oxford University Press - Print*	Shared print books	79% off list price
Oxford University Press - UPSO electronic**	Content from 21 presses on UPSO platform	83.7% off list price

*One print copy shared by four institutions.

**Each institution has access to all electronic content.

Preparing for a New Season of Collaboration

During the past two years, leaders across TRLN libraries recognized and expressed the need to review the consortium's organization and governance structure, which had not been formally adjusted in many years. TRLN's most recent program plan, *TRLN United: One Collection, One Community*, was created in 2010. Some work areas that were a priority at that time are no longer as relevant, while other priority areas have emerged that are not within the scope of *TRLN United*.

Given many recent changes in leadership at member libraries, as well as the evolving priorities of academic libraries, TRLN members agreed that it would be appropriate to reconsider our work priorities and the structure that supports them. Many formal and informal conversations have thus occurred over the past two years within programmatic councils, committees, and task groups; at the 2016 and 2017 TRLN Annual Meetings; with other consortia; and, most substantively, with the TRLN Advisory Council (AC) at a December 8, 2017, planning retreat and in its January 26, 2018, meeting. As a result of all of these conversations, the AC formally proposed to the Executive Committee (EC) a new set of work priorities and a new structure designed to achieve those priorities in the most agile way possible. On February 16, 2018, the EC approved this proposal, and the changes will officially take effect in January 2019.

Shared Priorities for the Next Three Years

The following program plan replaces *TRLN United* and will guide our collaboration and decision-making through 2021. It will be reviewed annually by the AC and EC.

> SHARING COLLECTIONS

- a. Develop a robust, complementary, accessible, and efficiently managed **print collection** that takes advantage of members' geographic proximity, serves diverse user communities, and highlights our unique collections.
 - i. Shared index
 - ii. Discovery
 - iii. Unmediated borrowing (and related policies)
 - iv. Consortial and external print retention initiatives
 - v. Innovative approaches to licensing, discovery, and access
- b. Continue to work toward **shared digital collections and collaborative licensing** of digital materials.

> RECRUITMENT AND DEVELOPMENT OF TALENT

- a. **Facilitate development and sharing of knowledge and skills** that increase the capacity, leadership, and creativity of individuals, libraries, and institutions.
 - i. Activities (seminars, training events, conferences, institutes)
 - ii. Communities (working groups, interest groups)
 - iii. Active relationships with SILS and SLIS

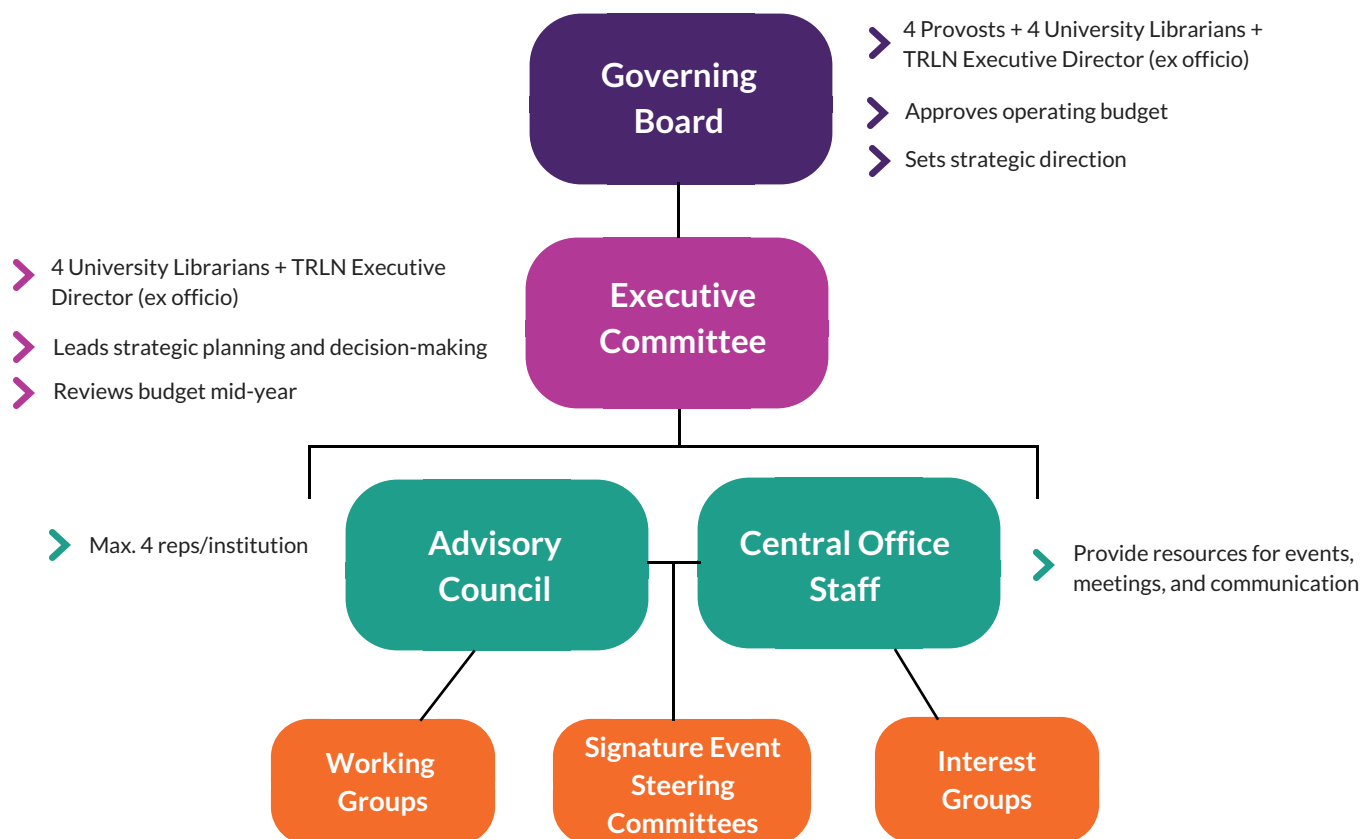
➤ EFFECTING CHANGE

- Pursue collaborative advocacy** in scholarly communication, including the research workflow, licensing of electronic materials, and sharing of digital resources.
- Disseminate our products and findings** through white papers on topics of interest to academic libraries, open source tools such as GitHub, presentations and posters, and social media.
- Expand our impact** with external entities such as the Association of Research Libraries (ARL), HathiTrust, OCLC, governmental agencies, other consortia, publishers, policy makers, and potential funders.

A New Structure for New Priorities

Previously, all TRLN activities were overseen by one of four programmatic councils: Collections, Human Resources, Services, and Technology. The new structure pictured below is intended to promote cross-domain collaboration and offers the following benefits:

- Priority areas and associated working groups are **reviewed annually** by the AC and the EC to assess their relevance and progress.
- The people engaged in the work of the consortium are allowed more **agility and self direction**.
- The **diversity of organizational structures and resources** within our member libraries is taken into consideration.
- It encourages and supports **grassroots initiatives** and ideas that may germinate at any level.



TRLN Central Office Staff



LISA CROUCHER
Executive Director
lisa@trln.org



BEN HEET
Program Officer
ben@trln.org



GENIA KAZYMOVA
Applications Developer
genia@trln.org



GINNY MASTERSON
Communication Specialist
ginny@trln.org

Keep in Touch



CB #3940
Wilson Library, Suite 712
Chapel Hill, NC 27514-8890



Phone: 919-962-8022
Fax: 919-962-4452



Event inquiries: Events@trln.org
General inquiries: Info@trln.org



@trln_main



www.trln.org

TRLN is a collaborative organization of Duke University, North Carolina Central University, North Carolina State University, and The University of North Carolina at Chapel Hill, the purpose of which is to marshal the financial, human, and information resources of their research libraries through cooperative efforts in order to create a rich and unparalleled knowledge environment that furthers the universities' teaching, research, learning, and service missions.



TRLN

TRIANGLE RESEARCH
LIBRARIES NETWORK