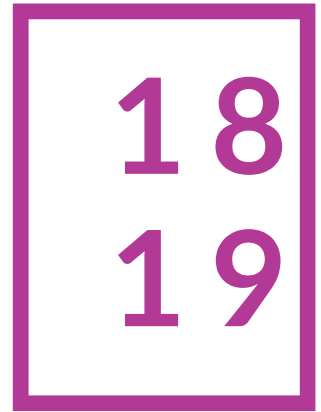




TRLN
TRIANGLE RESEARCH
LIBRARIES NETWORK



ANNUAL REPORT

July 1, 2018–June 30, 2019



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FROM THE EXECUTIVE DIRECTOR

This year marked significant transitions and discoveries for the Triangle Research Libraries Network (TRLN), as we ventured into new technological and administrative territory.

We developed and launched a flexible shared discovery service, hosted in the cloud rather than on servers in Research Triangle Park (RTP). Released to great fanfare in 2008, the previous shared catalog, Search TRLN, was starting to demand increased attention from the skilled developers and systems administrators who kept it in production.



In early meetings to chart our post-Search TRLN course, we discussed whether the successor should retain the option to search from a centralized location, branded with TRLN's signature purple, in addition to the option to search via each institution's own customized interface. For clarity in these discussions, we started affectionately referring to the TRLN-branded page at search.trln.org as "The Purple." There was little doubt that we were going to develop a new shared catalog; at issue was whether we wanted to retain The Purple.

Residing on the color wheel between blue and red, purple perfectly (and neutrally) represents our four institutions and has been a part of TRLN's identity for many years. We ultimately decided, though, that The Purple had served its purpose — to highlight the collaborative foundation of and provide a gateway to the shared catalog — and that we no longer needed centralized access to the underlying resource. In early 2019, thanks to the tireless and creative work of many, we rolled out TRLN Discovery as a shared catalog with a customized interface for each institution.

Just as our shared catalog was reconstituted in a new location, so was our consortium itself. The 1989 memorandum of understanding that formalized the current incarnation of TRLN states that the consortium will be administratively hosted by one of the member institutions, for a minimum of a three-year term. The University of North Carolina at Chapel Hill (UNC-Chapel Hill) was the inaugural administrative host, and, in the blink of a consortial eye, that three-year term turned into a thirty-year term. Taking into account various factors, including personnel transitions, as well as priorities and infrastructure at each institution, the TRLN Executive Committee decided that Duke University would be the consortium's new host. TRLN made the physical move to Durham in April and the administrative and technological move in subsequent months. We have begun the process of establishing a Duke-affiliated non-profit organization. This administrative arrangement is more closely aligned with our peer consortia and will facilitate increased independence and neutrality.

Through these momentous transitions and others certain to come our way in the future, TRLN stays true to the color purple and the enduring collaboration that it represents.

Lisa Croucher
Executive Director

EVENT HIGHLIGHTS

ANNUAL MEETING

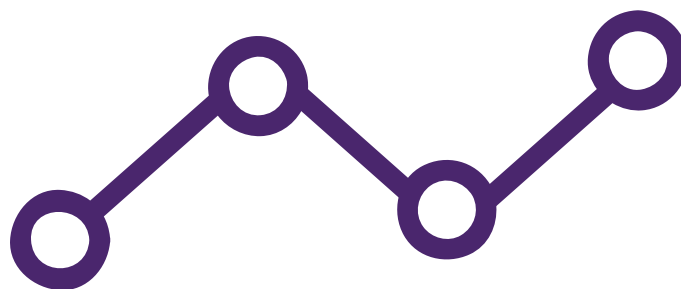


© Durham Convention Center

The Annual Meeting took place on August 20 at Durham Convention Center. The event kicked off with an address entitled, "Are We What We Measure? Information Flows in the Age of 'Monthly-Active-Users' and 'Engagement'" from keynote speaker, Zeynep Tufekci, Associate Professor at the UNC-Chapel Hill School of Information and Library Science. Dr. Tufekci provided a timely reminder of the importance of transparency from all who oversee information structures. The morning and afternoon sessions were filled with an array of presentations by TRLN library staff on various case studies, collaborative projects, and committee or task group activities. During the lunch hour, North Carolina author Zelda Lockhart gave an inspiring talk, interspersed with interactive activities and readings from her own work, that prompted attendees to think about the importance of connection with other people — whether strangers, clients, coworkers, or family members — and how to engage with our own stories to forge such a connection.

LINKED DATA SEMINAR

On September 6, a seminar on linked data took place at the Archie K. Davis Conference Center in RTP. This seminar was proposed by the TRLN Technical Services Task Group in response to growing interest and investment in linked data as it intersects with numerous library workflows. Nearly 80 library staff members from all four TRLN institutions attended the seminar, which focused on what linked data is and how it affects technical services workflows. Presenters highlighted linked data-related activities currently occurring in technical services, such as the conversion of bibliographic data from MARC to BIBFRAME.



EVENT HIGHLIGHTS



Participants read and provided feedback on each other's value proposition on day two of the ARL Library Liaison Institute.

ARL LIBRARY LIAISON INSTITUTE

On November 1–2, TRLN hosted a Liaison Institute presented by the Association of Research Libraries (ARL) as part of ARL Academy's Reimagining the Library Liaison program. Forty-four subject and functional liaisons from Duke, NC Central, NC State, and UNC-Chapel Hill libraries took part in the highly interactive 1.5 day workshop designed to help participants achieve the following:

- Understand the changing nature of higher education and the resulting needs of students, faculty, and researchers
- Learn how to evaluate and demonstrate their impact on teaching, learning, and research
- Apply a framework for rebalancing portfolios towards the most high-value and high-impact activities
- Develop ideas for evolving the liaison job description, ongoing professional development programs, and user engagement strategies to meet campus needs in this changing environment

EVENT HIGHLIGHTS

LIBRARY MANAGEMENT SKILLS INSTITUTE I

On April 8–10, TRLN hosted the Library Management Skills Institute I (LMSI I) presented by DeEtta Jones and Associates at The Rizzo Center in Chapel Hill. Facilitators engaged participants in case studies, practical applications, and group discussions on principles and skills key to effective management: management in context, behavioral styles, power dynamics and influencing skills, participatory decision making, the helping relationship, motivation, and coaching for performance.

The content is designed to be beneficial for supervisors, department heads, coordinators, managers, administrators, team and project leaders, or anyone interested in growing as a leader or manager. Based on the workshop evaluations, participants found the motivation and feedback sections and exercises to be particularly beneficial. As one attendee said, "I appreciated the time and attention they devoted to crafting feedback conversations, emphasizing how important it is to be prepared for them, and allowing us time to practice those skills." The group of 40 participants included 26 from TRLN institutions and 14 from other libraries in North Carolina, Maryland, and Virginia.

CULTURAL HUMILITY WORKSHOP



Sunny Kim and Lisa Croucher welcome participants to the workshop.

On April 24, TRLN hosted a cultural humility workshop presented by Sunny Kim, Teen Services Librarian at The Seattle Public Library, and Nicky Andrews, NC State University Libraries Fellow. The workshop was offered in two separate sessions to 120 TRLN library staff. Held at the Archie K. Davis Conference Center in RTP, the interactive workshop introduced participants to cultural humility, clarifying how it is different from cultural competence and demonstrating why it is an essential framework for resisting racism and bias in library work.

The workshop helped participants to work on the following goals:

- Gain a deeper understanding of the cultural humility framework
- Name and reflect on their own privilege and identities
- Get practice in interrupting scenarios of bias and problematic behavior
- Receive resources and recommendations for continuing to engage in cultivating cultural humility

CONSORTIAL UPDATES

TRLN DISCOVERY

TRLN Discovery was released in January, as three of the four TRLN member institutions deployed the shared index and discovery service to their campus communities. NC Central was the first to launch, unveiling the service on January 7. NC State launched on January 14, and Duke followed on January 16. After a beta public release in February, UNC-Chapel Hill launched on June 18.

TRLN Discovery significantly streamlines library users' experience by providing a single environment from which to efficiently search for and access research materials held by TRLN member libraries. This launch was the result of deep, ongoing collaboration over the past two years following the consortium's joint decision to move away from the legacy Endeca-based catalog and instead use open-source software tools to build a single, easily-customized shared discovery service. Blacklight and Solr serve as the foundation for the product, and much of the shared infrastructure is hosted in Amazon Web Services (AWS), a secure cloud service platform. A team of developers and product owners from Duke, NC State, UNC-Chapel Hill, and TRLN central office staff met regularly and followed an agile software development approach to review and prioritize each phase of the work.

TRLN Executive Director Lisa Croucher reflected, "With the combination of an index shared across four institutions, open source tools like Blacklight and Solr, and the AWS cloud, this project launches TRLN into a new frontier of shared discovery, one that we anticipate will result in increased efficiency and cost savings. Eleven years after we launched the Endeca-powered Search TRLN — a similarly creative approach to discovery — I'm pleased that we are able to again share our next generation shared discovery project with colleagues in the library and consortium community."

The product is overseen by the Shared Discovery Services Working Group. Updates about the project are available at trln.org/activities/trln-discovery.



Courtesy Duke University Libraries

CONSORTIAL UPDATES

TRLN SUPPORTS PROJECT RESHARE OPEN SOURCE LIBRARY RESOURCE SHARING PLATFORM



Project ReShare is a community of library consortia, vendors, and service providers committed to an open approach to library resource sharing systems. TRLN was an early and active contributor to the project whose vision is to build an open source, community-owned and managed, highly scalable library resource sharing platform and its accompanying software applications.

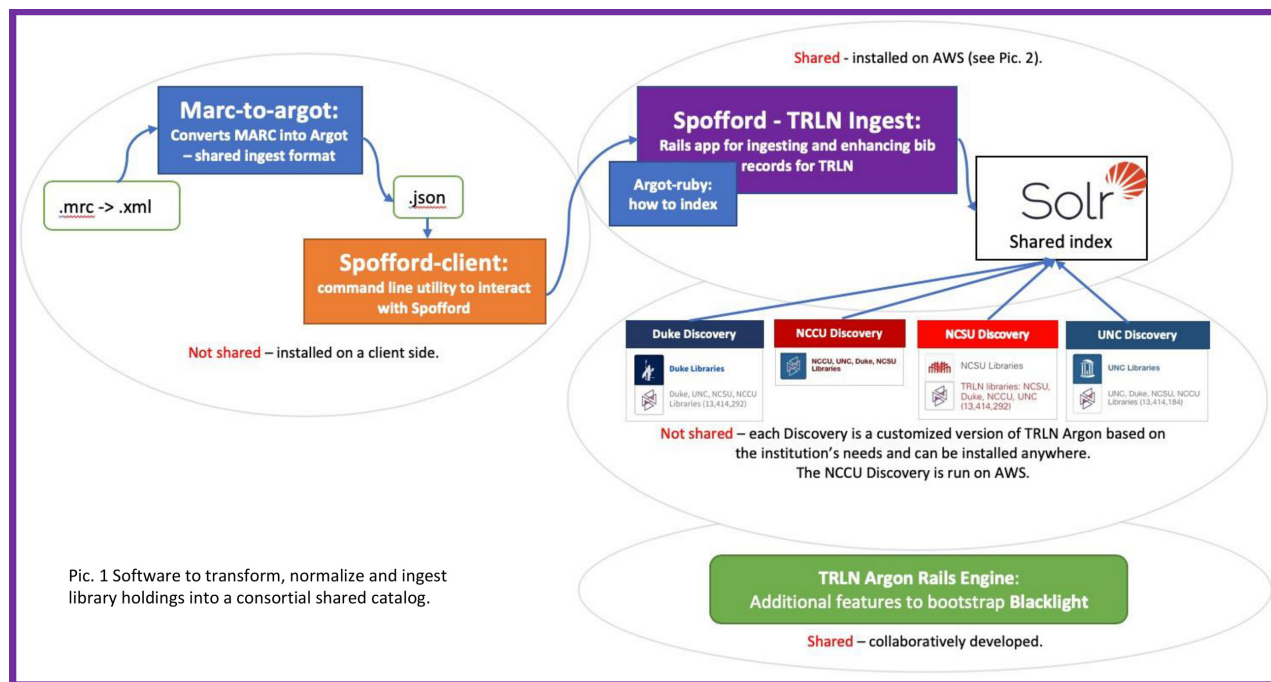
In February, TRLN announced that it would contribute financial support to Project ReShare. A beta version is expected in Spring 2020 and will enable the discovery, management, and fulfillment of unmediated interlibrary loan requests. The Pennsylvania Academic Library Consortium, Inc. (PALCI) and Index Data, a software company specializing in libraries, kickstarted construction of the platform with initial investments of funding and developer staff time, respectively.

TRLN's contribution of \$6,400 matches the per library contribution previously committed by PALCI, and reflects the consortium's desire to see alternative options and tools responsive to the strategic needs of the resource sharing community.

This monetary contribution will further support the design and development of the platform by covering costs related to Project ReShare's membership in the Open Library Foundation.

The Open Library Foundation provides ReShare with collaborative infrastructure and a home for the project's intellectual property, which will be made available under an open source software license. TRLN Executive Director Lisa Croucher reflects, "TRLN has been involved in ReShare since its inception, having contributed significant staff time and leadership to the project. We are pleased to now be able to make a more tangible commitment in the way of financial support as the project gains momentum. While resource sharing is a priority for most consortia, it is especially important for TRLN, due to the geographic proximity of our members and our long history of collaborative collection development." For more information about Project ReShare, visit projectreshare.org.

CONSORTIAL UPDATES



Pic. 1 Software to transform, normalize and ingest library holdings into a consortial shared catalog.

A portion of Genia Kazymova's poster presented at Code4Lib. Complete poster can be accessed at <https://osf.io/qyc6m>.

CODE4LIB

From February 20 through 22, a diverse community of developers and technologists for libraries, museums, and archives congregated in San Jose, CA, for the Code4Lib conference. This annual event is an excellent opportunity to share ideas and foster collaboration surrounding open technologies. The program included presentations that highlighted two of TRLN's high-priority collaborative efforts: the consortium's new shared index, TRLN Discovery, and Project ReShare. On day one of the conference, Emily Lynema, Department Head of Information Technology at NC State University Libraries and the TRLN Discovery Product Owner for NC State University Libraries, gave a presentation entitled, "Consortial Discovery and Resource Sharing: Making it Happen with (Mostly) Standard Tools." On day two, Genia Kazymova, TRLN Applications Developer, presented a poster session about the architecture of the shared index entitled, "Need a Shared Index? TRLN Discovery Project: Software and AWS Architecture Overview" (a portion of the poster pictured above). Finally, on day three, Jill Morris of PALCI and Kristen Wilson of Index Data presented on the challenges and opportunities present in the current landscape of resource sharing and Project ReShare's vision for how to meet them.

Additionally, TRLN contributed funding to support the Code4Lib Southeast regional conference held at NC State on May 31, attended by 95 people, including 60 people from TRLN.

CONSORTIAL UPDATES

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, 2018, and June 30, 2019.

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 (18,302), 48.17% of those loans (8,816 items) were to a TRLN institution.

For the purposes of this table, an "article" is a digital copy of an article or chapter that is retained by the borrower. A "loan" is any other physical, returnable item, such as a book, DVD, or CD.

JULY 1, 2018-JUNE 30, 2019 BORROWING AND LENDING

Duke	TRLN	Total	TRLN % of Total	NCCU	TRLN	Total	TRLN % of Total
Borrowing				Borrowing			
Articles	993	6,959	14.27%	Articles	178	428	41.59%
Loans	7,647	25,224	30.32%	Loans	9	333	2.70%
Total	8,640	32,183	24.08%	Total	187	761	41.74%
Lending				Lending			
Articles	635	4,094	15.51%	Articles	44	72	61.11%
Loans	4,889	30,027	16.28%	Loans	122	377	32.36%
Total	5,524	34,121	16.19%	Total	166	449	36.97%
NC State	TRLN	Total	TRLN % of Total	UNC-CH	TRLN	Total	TRLN % of Total
Borrowing				Borrowing			
Articles	120	16,513	0.73%	Articles	631	5,142	12.27%
Loans	4,971	10,795	46.05%	Loans	3,564	8,353	42.67%
Total	5,091	27,308	18.64%	Total	4,195	13,495	31.09%
Lending				Lending			
Articles	669	11,315	5.91%	Articles	1,022	5,267	19.40%
Loans	3,811	7,293	52.26%	Loans	8,816	18,302	48.17%
Total	4,480	18,608	24.08%	Total	9,838	23,569	41.74%

CONSORTIAL UPDATES

WORKING GROUPS

Working groups exist to develop, implement, or oversee a specific project or product related to TRLN's strategic priorities. They receive a formal charge from the Advisory Council that is reviewed on an annual basis. New working groups may be proposed to the Advisory Council by the Executive Committee, an interest group member, a TRLN staff member, or an Advisory Council member as needs evolve. Working groups and their 2018–2019 priorities are outlined below.



WORKING GROUP PRIORITIES

Resource Sharing

- Revise "Memorandum of Understanding Concerning TRLN Interlibrary and Document Delivery Services"
- Revisit statistics provided to TRLN
- Develop a solution for TRLN Direct data analysis and statistics

Electronic Resources Management

- Negotiate and finalize license for 2020–2022 Springer Nature deal
- Complete population of CORAL with TRLN e-resource deal data and put into maintenance mode
- Create deal calendar and package profiles for all TRLN e-resource deals to supplement data stored in CORAL

Collaborative Print: Monographs

- Establish the format and elements of the 583 field for materials committed to the TRLN monograph retention program; develop related standards and consult as needed to help libraries implement these standards
- Monitor consortial practices to ensure that TRLN remain consistent and interoperable with monograph retention initiatives elsewhere in order to ensure seamless integration of TRLN activities into a larger network of retention programs
- Consult with monograph retention projects at member institutions as needed

CONSORTIAL UPDATES

WORKING GROUP PRIORITIES CONTINUED

Collaborative Print: Serials

- Conduct inventory of contributing library's holdings for each title and report gaps
- Update holdings records of contributing library to indicate commitment to Collaborative Print Retention
- Determine if and which partner libraries can fill gaps and indicate on holdings inventory; update holdings records to indicate commitment to Collaborative Print Retention

Shared Discovery Services

- Oversee design and implementation of system architecture necessary to achieve TRLN's goals for the shared discovery service
- Gather feedback from end-users and library staff, especially those staff representing user service areas, to make appropriate decisions about functional requirements and user interface design
- As necessary, develop mechanisms for collecting and evaluating functionality requests and setting priorities for phased implementation

INTEREST GROUPS

During the 2018–2019 year, TRLN implemented a new interest groups process. Interest groups provide a forum for groups of individuals who want to explore a particular area of common interest, regardless of whether the topic is explicitly aligned with a TRLN priority area. The desire to establish an interest group may be expressed by an individual or group of individuals within a member library or by a TRLN staff member. Proposals to establish an interest group are submitted via the Interest Group Proposal Form and are reviewed by the TRLN Advisory Council. The Proposal Form requests information such as:

- A brief description of the interest group
- Activities that the interest group may engage in during a calendar year
- A list of names of others on each campus whom are anticipated to be active participants in the interest group
- An acknowledgement that the interest group may be asked to submit two brief reports (approximately January and June) to the TRLN Advisory Council

For more details about interest group expectations, membership, and resources, please visit trln.org/activities/interest-groups. The Interest Group Proposal Form can be accessed at <https://bit.ly/2RLdRwR>.

CONSORTIAL UPDATES

INTEREST GROUPS CONTINUED

The **Disaster Response Interest Group** formed in October with goals for updating and documenting TRLN's mutual assistance agreement and assessing training needs and opportunities for further collaboration. The group planned projects for an HBCU Library Alliance Summer Conservation/Preservation intern, Garrette Lewis-Thomas, hosted by Duke and contributing time to the interest group. By the end of June, Garrette had begun site visits and gathering information about preparedness in TRLN libraries.



© UNC-Chapel Hill University Libraries



The **Diversity, Equity, and Inclusion Interest Group** formed with the goal to provide opportunities for discussion and exploration of issues relating to recruitment and retention of a diverse workforce and creating an inclusive environment for patrons and library staff, as well as addressing diversity, equity, and inclusion issues as they relate to services to library users and researchers.

CONSORTIAL UPDATES

The **Special Collections Technical Services Interest Group** consists of staff working in technical services in special collections with the goal of working together to solve the problems that TRLN libraries face in efforts to provide access to rare and unique collections.



Courtesy Duke University Libraries



© Canva Stock

The **Research Data Interest Group** enables TRLN to support research data management and use by preparing activities and events related to research data and facilitating opportunities for TRLN library staff interested in research data to connect with resources and each other.

The **Collections Interest Group** was formed in March when a small group of collections domain experts convened informally to discuss collections-related issues. At the March meeting, a proposal was made to create an interest group to facilitate continued discussions of collections-related issues among collections domain experts. The Collections Interest Group was approved by the TRLN Advisory Council as of May. The group convenes on an as-needed basis.



Courtesy Duke University Libraries

IN REMEMBRANCE



REMEMBERING JOE A. HEWITT AND SUSAN K. NUTTER

Dr. Joe A. Hewitt, university librarian at the University of North Carolina at Chapel Hill from 1993–2004, passed away on December 19, 2018. Hewitt believed deeply that the library belonged to the people of North Carolina and that its collections and staff should serve the state. This sense of commitment and responsibility guided his tenure, resulting in projects like "Documenting the American South," which digitized frequently requested slave narratives.

Hewitt's beloved wife and best friend, Susan K. Nutter, of Durham, passed on March 25, 2019. Former vice provost and director of the NC State University Libraries, Nutter retired in 2017 after a 30-year career at North Carolina State University. Nutter is best known for spearheading the development of the iconic and award-winning James B. Hunt Jr. Library at NC State, which created a new model for how academic libraries can be a platform for teaching, learning, and research through collaborative spaces and innovative technology.

Hewitt and Nutter both dedicated their energy and intellect to TRLN. Alongside Hewitt's and Nutter's leadership, David Ferriero (Duke University library director, 1996–2004) and Dr. Floyd C. Hardy (NC Central University library director, 1985–1999, interim director 2001–2003) were the driving force of TRLN during a time of great change, opportunity, and success. Their combined expertise made lasting contributions to TRLN as the consortium entered the 21st century.

Sources:

Obituary of Joe A. Hewitt, *The News & Observer*, April 21, 2019.

Obituary of Susan K. Nutter, *The News & Observer*, April 14, 2019.

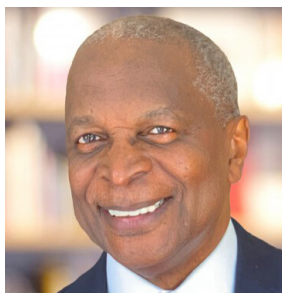
MEMBER LEADERSHIP TRANSITIONS



Duke University: Femi Cadmus was named the Archibald C. and Frances Fulk Ruffy Research Professor of Law, associate dean of information services and technology, and director of the J. Michael Goodson Law Library at Duke Law School.



Duke University: Megan von Isenburg was named associate dean for the Medical Center Library & Archives. Von Isenburg serves on the TRLN Advisory Council.



North Carolina Central University: Patrick R. Liverpool, Ph.D., was appointed to serve as interim provost and vice chancellor of academic affairs for North Carolina Central University made effective on June 1, 2019. Liverpool serves on the TRLN Governing Board.



North Carolina State University: Greg Raschke was named senior vice provost and director of NC State University Libraries made effective December 1, 2018. Raschke serves on the TRLN Executive Committee.

TRLN CENTRAL OFFICE UPDATES

TRLN'S RELOCATION

In April, TRLN moved locations from Wilson Library at UNC-Chapel Hill to Bostock Library at Duke. TRLN is working through agreements at Duke and UNC-Chapel Hill to be administratively hosted at Duke and to move toward incorporating as a 501(c)(3) nonprofit.



Photo by Genia Kazymova

STAFF CHANGES

After years of major contributions to TRLN, Program Officer Ben Heet left in January to relocate to Chicago with his family. Ben joined TRLN in 2014 and provided invaluable expertise, program management skills, and strategic insight to all TRLN activities. His skills were especially critical to resource sharing initiatives and the success of the TRLN Discovery project.

In the spring, TRLN worked with Duke HR to begin recruiting for a Program Officer. TRLN also began recruitment for a Program Administrator whose responsibilities include assisting with the processes associated with becoming a nonprofit.



SHARED PRIORITIES 2019–2021

TRLN CONTINUES TO FOCUS ON SHARED PRIORITIES FOR 2019–2021

► 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



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► 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 the School of Information and Library Science at UNC-Chapel Hill and the School of Library and Information Sciences at NC Central

SHARED PRIORITIES 2019–2021

► Effecting Change

- a. Pursue collaborative advocacy in scholarly communication, including the research workflow, licensing of electronic materials, and sharing of digital resources
- b. 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
- c. 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



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